

DELI TURKEY BREAST CATEGORY APPRAISAL

**PREPARED FOR: ARMOUR SWIFT ECKRICH, INC.
PREPARED BY: MOSKOWITZ JACOBS, INC.**

NOVEMBER, 1997

FINAL REPORT

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STUDY OVERVIEW

- ✓ Pre-recruit in 3 MJI CLT Designlab® testing facilities: New York, Atlanta and Chicago.
 - ✓ N = 103
 - ✓ Random Sample = 71
 - ✓ Butterball Users = 66 (Includes those that “fell in” from Random Sample & Augment Sample).
 - ✓ Each respondent evaluated 8 deli turkey products blind and unbranded in a supervised, self-administered computer-aided interview.
 - ✓ Randomized order of product trial.
 - ✓ Following the taste evaluation, respondents completed a visual evaluation of the 8 products blind and then branded.
 - ✓ 2 hours over 1 day
 - ✓ Serving Size: Taste Test: 2 Slices folded on a plate
Visual Evaluation: Whole, unwrapped turkey breast labeled with product number or brand name (viewed on display tables)
 - ✓ Palate cleanser: Water and Crackers
 - ✓ Rest period: 5 minutes
- * See appendix for detailed sequence of activities.

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RESPONDENT QUALIFICATIONS

Screening criteria were set forth by Armour Swift Eckrich, Inc.:

- Females 80% and Males 20%
- Age 21-69
- Purchased and eaten turkey breast sliced to order from the Deli Counter in the past three months
- No past 6 month participation in any food related market research studies
- Industry security
- Not on a strict medical diet
- No kosher household
- Augment sample of Butterball brand turkey breast past 3 month users

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RATING SCALE

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RATING SCALE

Respondents used a 100-point scale to answer the following types of questions. Based upon MJJ's experience this scale is easily understood by respondents and is sensitive to fine differences, where differences exist.

LIKING ATTRIBUTES

- ✓ Evaluative rating that described how much a respondent liked/disliked a product overall and on a sensory attribute/level.
 - Scale for likings (00=hate, 100=love)

SENSORY ATTRIBUTES

- ✓ Descriptive measures that provide a sensory profile.
 - Scale for sensories (00=none/very little of an attribute, 100=a lot of an attribute)

IMAGERY ATTRIBUTES

- ✓ Descriptive measures that provide an imagery profile (based on perceptions and past experiences).
 - Scale for imageries (00=none/very little of an imagery attribute, 100=a lot of an imagery attribute)

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RATING SCALE

- Continued -

SENSORY DIRECTIONAL ATTRIBUTES

- ✓ Evaluative measures that indicate how respondents felt about a sensory attribute.
- Scale for sensory directionals (00=not enough of an attribute, 50=just right, 100=too much of an attribute)

INTERPRETATION OF SENSORY DIRECTIONALS

For analytical purposes, 50 points were subtracted from each directional's mean rating. The scale interpretation of sensory directionals is as follows:

0	=	just right (on target)
<-10	=	not enough of an attribute (problem)
>+10	=	too much of an attribute (problem)

Based on MJJ's experience, any deviation greater than ± 10 points from the "just right" score may require modification on that attribute.

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MANAGEMENT SUMMARY

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SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

ASE's portfolio of deli turkey breasts are well poised for pursuit of a segmentation strategy based on the evaluation of sliced turkey.

Two dichotomous sensory segments are evident. They are equal in size.

Moistness/Tenderness Seekers

Drier/Less Tender Seekers

- ✓ Both Healthy Choice and Butterball Oven Roasted satisfy the preferences of those consumers who appreciate a moist/tender deli turkey.
 - parity overall liking with Sara Lee
 - significantly higher overall liking vs. Boar's Head, Alpine Lace and Dietz & Watson
- ✓ Longmont clearly satisfies the tastes of those looking for a drier/less tender turkey breast.
 - at parity on overall liking with Boar's Head & Alpine Lace
 - significantly higher overall liking vs. Sara Lee & Dietz & Watson
- ✓ Butterball Golden Brown satisfies both segments equally though at parity to Sara Lee and Boar's Head.

Both Butterball Golden Brown and Longmont have the added advantage of a superior liking of appearance on the basis of the whole breast.

- Driven by a darker outside and inner color, more visible grain of the meat
- Longmont's more natural shape and appearance that is similar to homemade.

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SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

- Continued -

Given that both segments are equal in size and ASE has products that are satisfying the tastes for each segment...

Recommendations for product reformulation are limited to improvement of the appearance of the whole breast of Healthy Choice and Butterball Oven Roasted.

- Ideally, these products may be enhanced with an outer appearance that is darker in color as well as a darker inner appearance with more visible grain. (Longmont and Butterball Golden Brown represent the sensory reference targets on these dimensions).
- This improved appearance may enhance the products' trial generating ability.

In addition, MJ1 recommends that ASE consider the following:

Distribution of a Longmont formulation in grocery channels.

Exploration of a distribution (multiple products in all channels) and communication strategy that can capitalize on the opportunity the segmentation of tastes presents.

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SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

- Continued -

In summary, MJJ's recommendations are both tactical and strategic.

Tactical recommendation= Improve whole breast appearance of Butterball Golden Brown and Healthy Choice to enhance trial.

Strategically, ASE has two options:

- Option #1: Pursue a segmentation strategy with multiple products targeted at each of the two segments.
- ✓ A Longmont product formulation to the Drier/Less Tender Seekers.
 - Explore marketing under the Butterball vs. Healthy Choice brand name.
 - ✓ Butterball Oven Roasted and/or Healthy Choice to the Moistness/Tenderness Seekers.
 - *With improved whole breast appearance(using Longmont and Butterball Golden Brown as reference targets).*

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SUMMARY OF CONCLUSIONS AND RECOMMENDATIONS

- Continued -

Option #2:

Pursue a single product strategy with Butterball Golden Brown.

- ✓ Butterball Golden Brown satisfies both segments equally though not as well as Longmont for the Drier Seekers and directionally less than Butterball Oven Roasted among Moist Seekers.

The superior whole breast performance vs. the Healthy Choice and Butterball Oven Roasted may improve the competitive position overall via greater trial generating potential.

- The product "delivers" when sliced, so repeat should not be an issue.

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“REPORT CARD” OF PRODUCT PERFORMANCE

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“REPORT CARD” OF PRODUCT PERFORMANCE (TURKEY SLICE)

How did the products perform on overall liking?

Seven of the eight products generated similar overall liking scores at a moderate level of liking.

- Longmont and Butterball Golden Brown were the top numerical scorers along with
- Boar's Head and Sara Lee
- Dietz & Watson was the weakest performer.

Judgments per Product →	Overall Liking (71)
<i>Longmont Oven Prepared Breast</i>	61
<i>Butterball Golden Brown</i>	60
<i>Boar's Head Oven Gold</i>	59
<i>Sara Lee Premium</i>	58
<i>Alpine Lace Fat Free</i>	54
<i>Healthy Choice Oven Roasted</i>	54
<i>Butterball Oven Roasted</i>	54
<i>Dietz & Watson</i>	49

Significant Difference at 95% Confidence Level | +/-10|
Significant Difference at 90% Confidence Level | +/-8|

♦ Based upon previous studies across a wide variety of food and beverage categories.

MJI NORMATIVE SCALE*	
Overall Liking Rating	Interpretation
70+	Excellent
60 - 69	Very Good
50 - 59	Acceptable, but needs work
40 - 49	Needs major reformulation
Less than 40	Poor

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“REPORT CARD” OF PRODUCT PERFORMANCE (TURKEY SLICE)

- Continued -

The relatively narrow range of overall liking scores at moderate levels suggests several possibilities:

All products were perceived to be similar sensorially and thus received comparable ratings.

Products were perceived to be different sensorially but consumers were equally accepting of sensory differences.

Or,

Products were perceived to be different sensorially but these differences were appreciated by two groups of consumers at opposing ends of a sensory spectrum resulting in moderate scores on a random sample basis.

This would be a case of sensory segmentation, which will be addressed later in this report.

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“REPORT CARD” OF PRODUCT PERFORMANCE (TURKEY SLICE)

- Butterball Users -

Were there differences in Overall Liking scores Among Butterball Users (Past 3 Months) vs. Random sample?
The patterns of overall liking are comparable among the Augment sample of Butterball users.

This would suggest that the Butterball users may not be recognizing a sensory signature or if they are, they do not reward it with higher liking scores.

Brand usage data indicates that past 3 month Butterball users are brand switching. (See table on next page)
Implication: These two factors suggest a Butterball vulnerability given consumer acceptance of a wide variety of brands on a blind basis. (in the absence of branding or positioning)

	Overall Liking	
	Random Sample+ (71)	Butterball Users (66)
Judgments per Product →		
Longmont Oven Prepared Breast	61	64
Butterball Golden Brown	60	56
Boar's Head Oven Gold	59	61
Sara Lee Premium	58	57
Alpine Lace Fat Free	54	58
Healthy Choice Oven Roasted	54	53
Butterball Oven Roasted	54	52
Dietz & Watson	49	54
Significant Difference at 95% Confidence Level	[+/-10]	[+/-10]
Significant Difference at 90% Confidence Level	[+/-8]	[+/-8]

+ Random Sample Includes 37 Butterball Users.

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BRANDS PURCHASED -- PAST 3 MONTHS

Brand usage data indicates that the past 3 months Butterball users are brand switching.

- 59% purchasing Boar's Head.

<u>Brands</u>	Base Size →	Random Sample (71) %	Butterball Users (66) %
Butterball		49	100
Louis Rich		61	49
Healthy Choice		56	39
Boar's Head		48	59
Sara Lee		38	27
Mr. Turkey		29	17
Alpine Lace		26	15
Bil Mar		24	18
Dietz & Watson		9	7
Other		6	17

Implication: The switching behavior coupled with the fact that Butterball Users (past 3 months) rated other brands comparably on an unbranded basis suggests a vulnerability for the Butterball brand.

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SENSORY PERCEPTIONS

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HOW WERE THE PRODUCTS PERCEIVED SENSORIALLY?

(TURKEY SLICE)

The following "perceptual maps" clearly show that the 8 turkey breasts tested spanned the sensory spectrum on three key dimensions. MJJ has applied the tool of Principal Components Analysis to identify the sensory dimensions.

- The products were then "mapped" on these dimensions with the objective of understanding which products were perceived similarly vs. differently from one another.
- These dimensions are descriptive in nature and do not define a relationship to overall liking.

% of Variance explained

Juiciness/Wetness*/Tenderness

48%

Strength of taste/Saltiness

24

Leanness

14

Implication:

The products were perceived to be quite different from one another with the above dimensions as discriminating sensory attributes.

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- * Wetness encompasses appearance as well as mouth feel.

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BACKGROUND TO PRINCIPAL COMPONENTS

- Measuring Differences In Perception -

APPROACH

- Each product was rated on many sensory attributes covering appearance, taste, and textural qualities.
- To make analysis of the data easier, it is helpful to reduce the number of individual sensory attributes to a few easy to understand, independent sensory components.

PRINCIPAL COMPONENTS:

- Principal component analysis is a statistical tool that can be used to analyze interrelationships among a large number of variables (i.e., sensory attributes) and explain these variables in terms of their common underlying sensory components (components). The approach involves finding a way of condensing the information contained in a number of sensory attributes into a smaller set of sensory dimensions/components with a minimum loss of information.
- All products are included in the principal component analysis.

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INTERPRETATION OF SENSORY MAPS (TURKEY SLICE)

The following provides an example of how to read the sensory maps using the one that follows as an example.

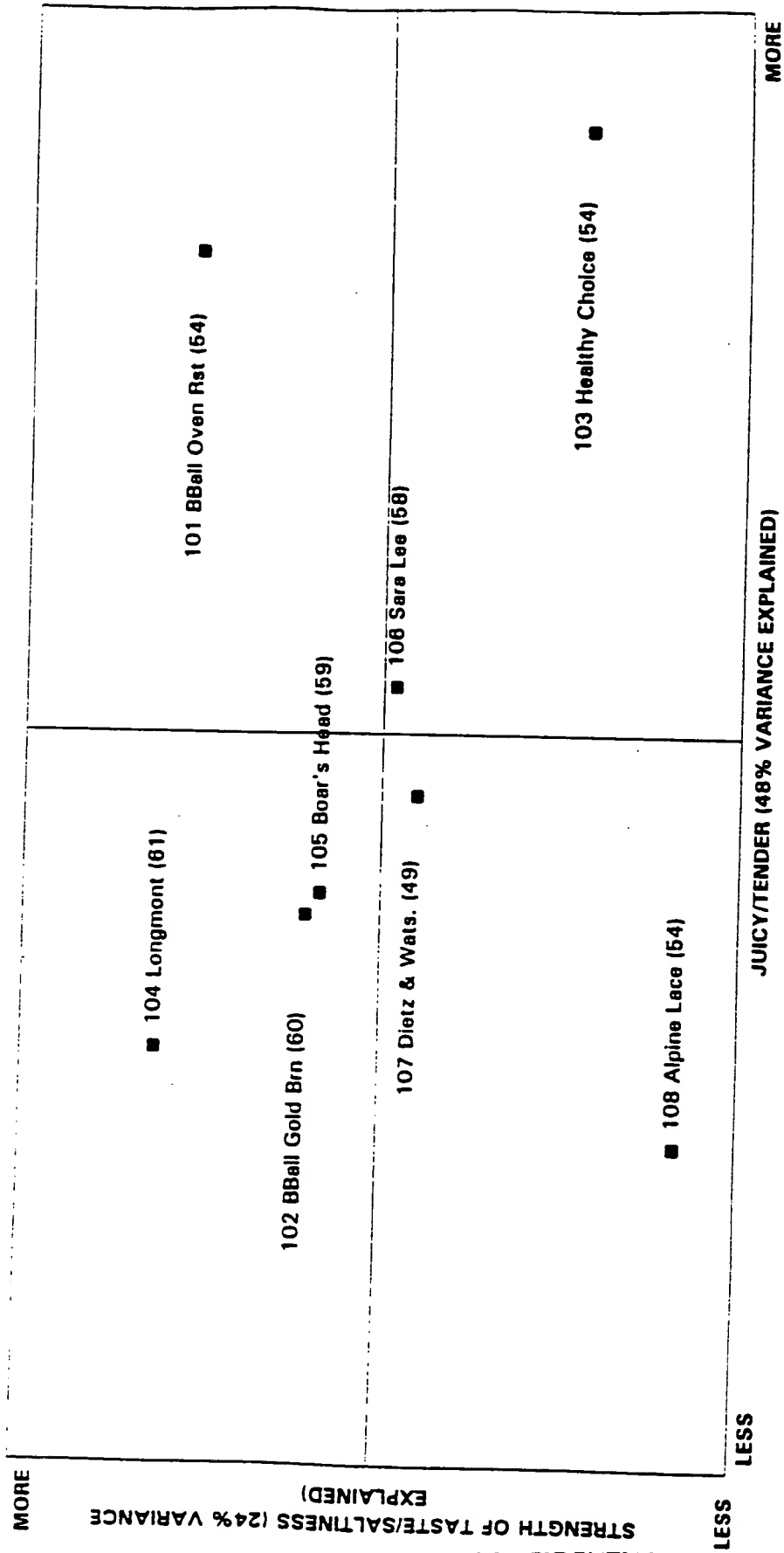
- ✓ Butterball Oven Roasted and Healthy Choice are perceived equally on the juiciness/tender dimension with Longmont and Alpine Lace defining the opposite end of the spectrum.
- ✓ Longmont and Butterball Oven Roasted are perceived to be stronger in taste and saltier with Alpine Lace and Healthy Choice at the weaker end of the taste spectrum.

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PERFORMANCE OF DELI TURKEY BREAST PRODUCTS
- RANDOM SAMPLE -
JUICY/TENDER VS. STRENGTH OF TASTE/SALTINESS



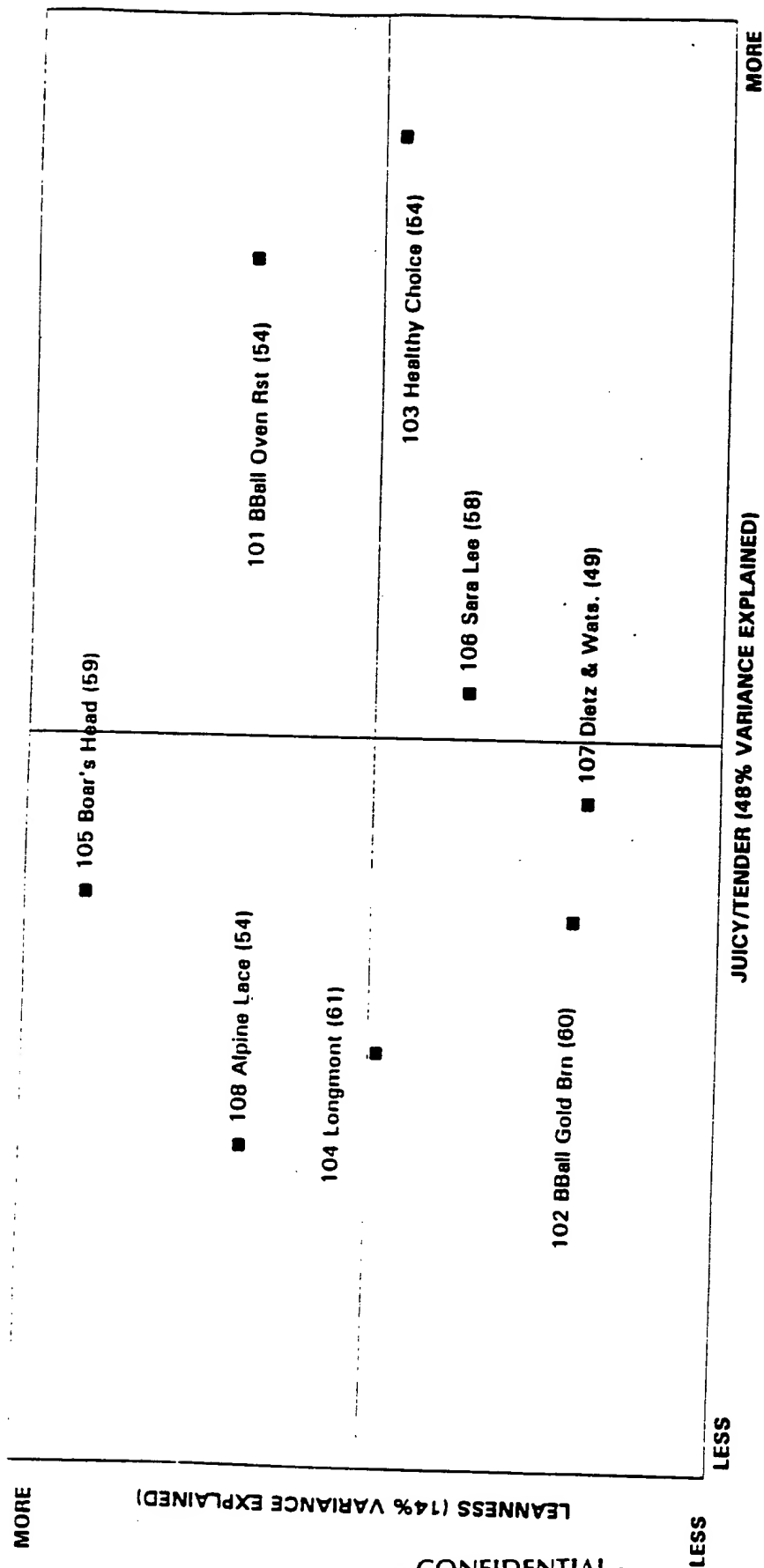
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SCALE: X Axis -2 to +2 Y Axis -2 to +2

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PERFORMANCE OF DELI TURKEY BREAST PRODUCTS - RANDOM SAMPLE - JUICY/TENDER VS. LEANNESS



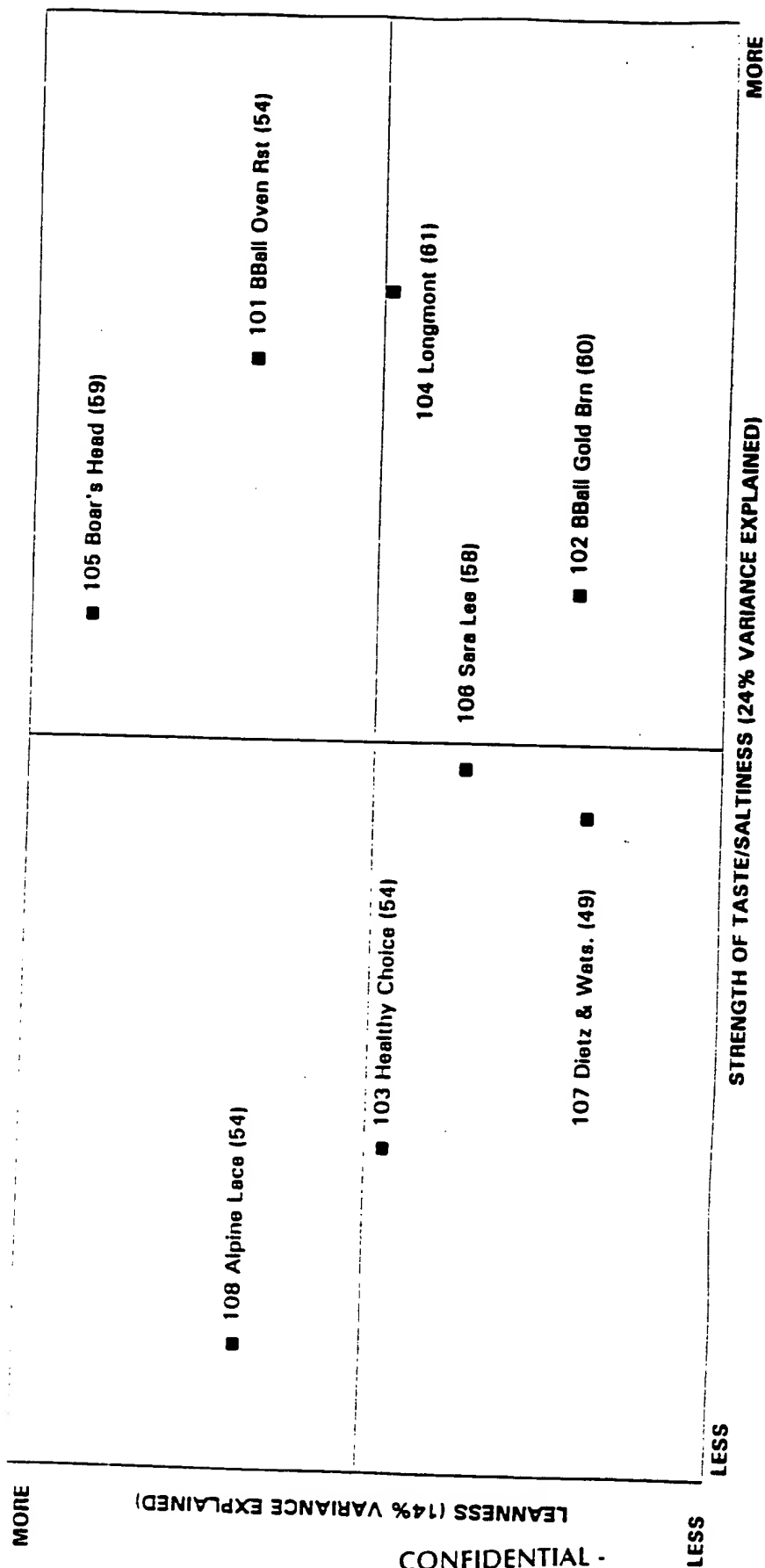
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SCALE: X Axis -2 to +2 Y Axis -2 to +2

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PERFORMANCE OF DELI TURKEY BREAST PRODUCTS
 - RANDOM SAMPLE -
 STRENGTH OF TASTE/SALTINESS VS. LEANNESS



SCALE: X Axis -2 to +2 Y Axis -2 to +2

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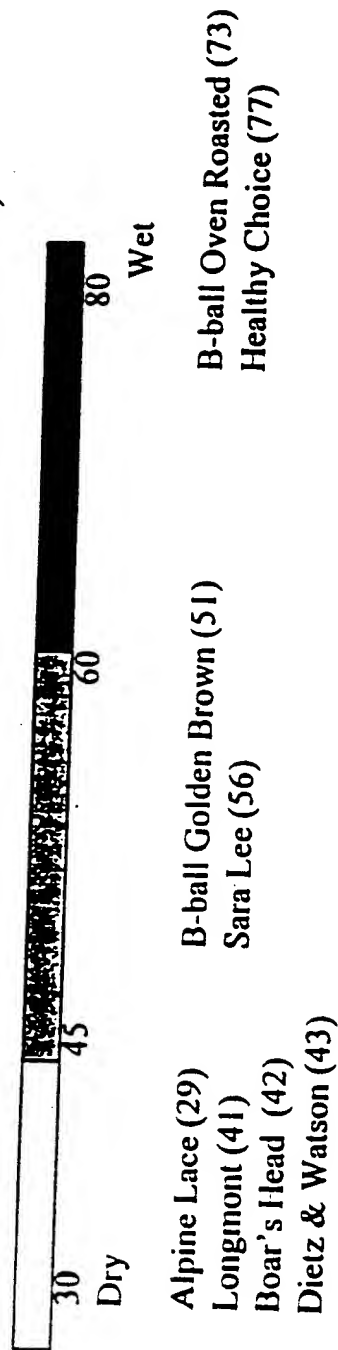
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PERCEIVED SENSORY DIFFERENCES OF THE TURKEY PRODUCTS

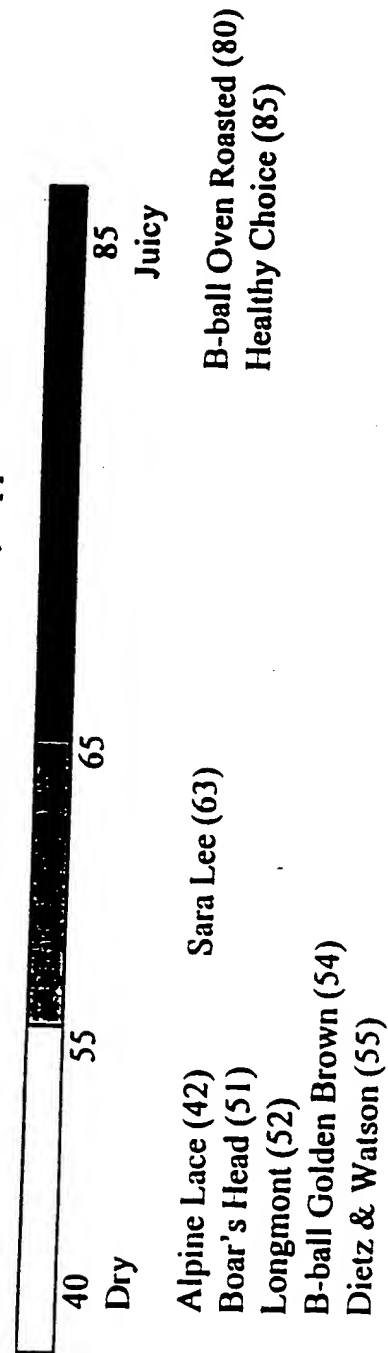
- Among Random Sample -

How do the specific products fall on the range of these dimensions?

Sensory Range for Wet Surface
(After tasting, would encompass appearance and mouth feel)



Sensory Range for Dry vs. Juicy Appearance



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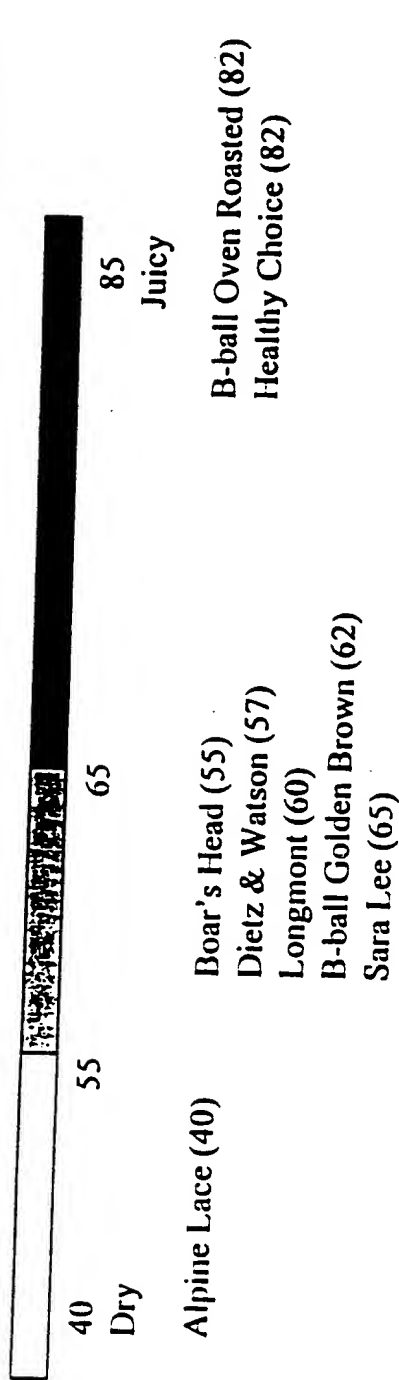
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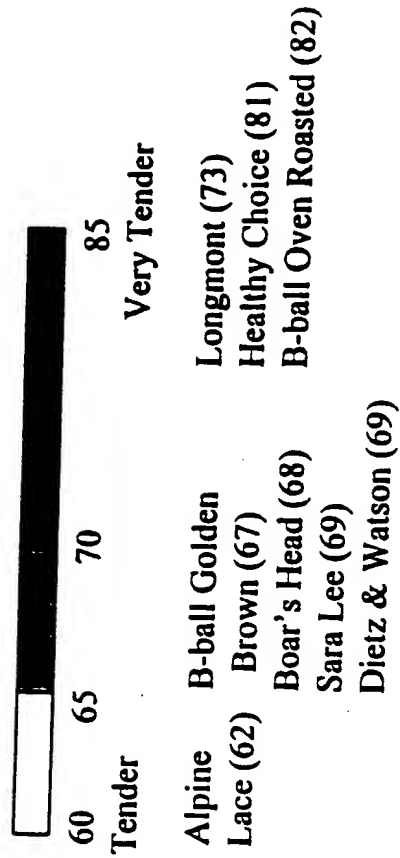
PERCEIVED SENSORY DIFFERENCES OF THE TURKEY PRODUCTS

- Among Random Sample -

Sensory Range for Dry vs. Juicy Texture



Sensory Range for Tough vs. Tender Texture



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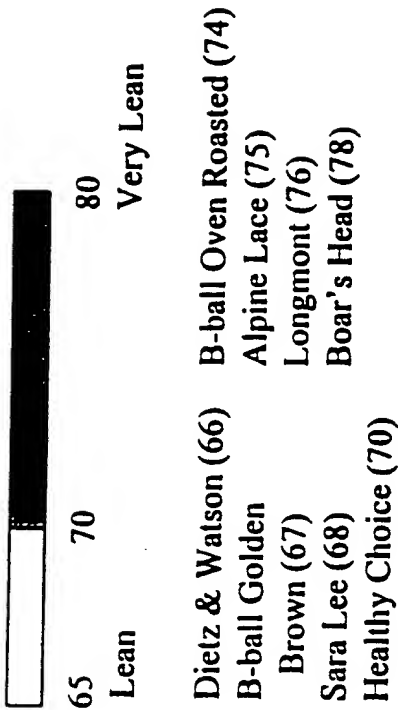
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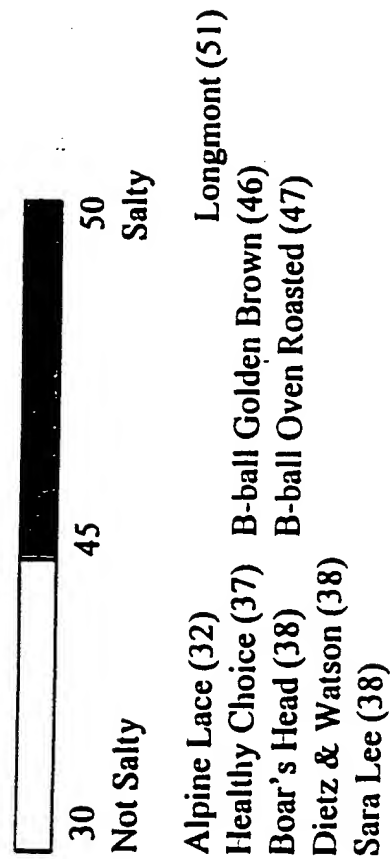
PERCEIVED SENSORY DIFFERENCES OF THE TURKEY PRODUCTS

- Among Random Sample -

Sensory Range for Lean Texture



Sensory Range for Saltiness



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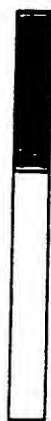
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PERCEIVED SENSORY DIFFERENCES OF THE TURKEY PRODUCTS

- Among Random Sample -

Sensory Range for Strength of Taste



55

Taste

65

69

Strong Taste

Alpine Lace (55)

Healthy Choice (61)

Dietz & Watson (62)

Sara Lee (62)

B-ball Golden Brown (67)

B-ball Oven Roasted (68)

Boar's Head (69)

Longmont (69)

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SENSORY SEGMENTATION

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BACKGROUND TO SENSORY SEGMENTATION

Definition of Sensory Segments

- Sensory segments are groups of consumers with similar sensory (attribute intensity) preferences.

Goal

- This approach reveals opportunities for developing products for market segments.

MJL Approach

- Determine the sensory scores where liking peaks for each respondent on each attribute.
- Since sensory attributes are not necessarily independent of one another, we factor analyze the optimal sensory levels to reduce redundancy.
- Respondents with similar sensory preferences are clustered into the same sensory segment. These respondents have similar optimal levels for each sensory attribute.
- The sensory segments are defined/identified in terms of patterns of sensory characteristics the respondents like.

Learning

- The relative size of each segment.
- The characteristics of each segment.
- The liking ranges by product for each segment.

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SENSORY SEGMENTATION (TURKEY SLICE)

Given the fact that products were perceived to be quite different sensorially but received fairly equal and moderate liking scores ... is sensory segmentation emerging?

Yes, two distinct, comparably sized segments emerged:

- *Differentiated primarily by the degree of moistness and to a lesser extent, tenderness of the products.*
- *Relatively equal in size.*

The "Moistness/Tenderness Seekers" prefer a turkey breast that is wetter in both appearance and texture.

In contrast, the "Drier/Less Tender Seekers" prefer products that are far less moist/juicy in both appearance and mouthfeel and somewhat less tender.

<u>Sensory Attribute</u>	<u>Mean Optimal Sensory Level</u>	
	<u>Drier/Less Tender Seekers</u>	<u>Moistness/Tenderness Seekers</u>
Dry vs. Juicy Appearance	46	77
Dry vs. Juicy Texture	46	76
Wet Surface	36	69
Tough vs. Tender Texture	65	79
Light vs. Dark Color	51	42
Strength of Aroma	57	59
Strength of Taste	64	65
Saltiness	43	44
Strength of Aftertaste	54	58
Chewiness	55	49
Fatty vs. Lean Texture	76	72

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SENSORY SEGMENTATION (TURKEY SLICE)

- Continued -

Overall Liking varied dramatically by sensory segment with several products emerging as particularly well liked within each segment.

Judgments Per Product->	Random Sample (71)	Moistness/ Tenderness Seekers (37)	Drier/ Less Tender Seekers (34)
Longmont Oven Prepared Breast	61	52	71
Butterball Golden Brown	60	60	60
Boar's Head Oven Gold	59	54	64
Sara Lee Premium	58	63	53
Alpine Lace Fat Free	54	43	66
Healthy Choice Oven Roasted	54	67	40
Butterball Oven Roasted	54	66	40
Dietz & Watson Premium	49	51	47
	[+/-10]	[+/-12]	[+/-14]
	[+/-8]	[+/-10]	[+/-12]

Significant Difference at the 95% Confidence Level
Significant Difference at the 90% Confidence Level

Note: Although the base sizes are small, the patterns in the data are very dramatic and therefore we can feel confident in the conclusions that follow.

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IMPLICATIONS OF SENSORY SEGMENTATION (TURKEY SLICE)

- Continued -

As a group, the 3 ASE products are clearly satisfying both segments of turkey consumers with one of the three straddling both segments:

Among the segment looking for a drier less tender turkey breast Longmont scores particularly well (OL= 71), And represents ASE's best opportunity within this group.

Vs. competition:

- overall liking at parity with Boar's Head & Alpine Lace
- overall liking significantly higher than Sara Lee and Dietz & Watson

While Butterball Oven Roasted and Healthy Choice clearly satisfy the complementary segment (OL= 66 & 67 respectively).

Vs. competition:

- overall liking at parity with Sara Lee
- overall liking significantly higher than Boar's Head, Alpine Lace and Dietz & Watson

Butterball Golden Brown satisfies both segments equally as a "middle of the road" entry at parity to competition.

- None of the competitive brands tested achieve this enviable position.

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SENSORY SEGMENTATION (TURKEY SLICE)

- Continued -

Do the segments differ demographically?

(Note: Given the relatively small base size this data should be viewed directionally only).

One dramatic demographic difference is evident:

The Drier/Less Tender Seekers are almost exclusively female (91%) whereas the counterpart segment was comprised of only two-thirds females.

	Moistness/ Tenderness <u>Seekers</u>	Drier/ Less Tender <u>Seekers</u>
(Base)	(37)	(34)
<u>Gender (%)</u>		
Male	32	9
Female	68	91

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SENSORY DRIVERS OF LIKING

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WHAT ARE THE SENSORY DRIVERS OF LIKING?

(TURKEY SLICE)

Given the clear sensory segmentation in this category the drivers of liking must be examined for each segment.

Approach: Examine the Sensory Response Curves. Sensory Response Curves establish the relationship between sensory attributes and overall liking via Regression Analysis.

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HOW TO INTERPRET THE SENSORY RESPONSE CURVES

Approach

- Regression analysis establishes the relationship between sensory perceptions and different levels of acceptance.
- This approach uses sensory response attributes as the independent variables and overall liking as the dependent variable.
- Sensory attribute intensity is plotted on the X-axis versus overall liking on the Y-axis.

Products are plotted on a "fitted" curve and display the effect on acceptance as sensory intensity increases.

Interpretation





The black indicators on the curve represent the locations of the products on the curve corresponding to their "X" scores.

- The directory in the upper-right corner lists the products with their respective "X" scores. The "X" score is the mean rating of the product for that particular sensory attribute.

The R-squared statistic appears in the lower-left corner of each curve. R-squared statistics can range from 0 to 1. The higher the R-squared, the better the "fit" of the curve to the products.

HOW TO INTERPRET THE SENSORY RESPONSE CURVES

INTERPRETATION OF THE CURVES

Shape Of Curve	Interpretation
Upward Sloping 	As the amount of the sensory attribute increases, overall liking increases.
Downward Sloping 	As the amount of the sensory attribute increases, overall liking decreases.
Inverted U-Shape 	As the amount of the sensory attribute increases, overall liking increases, then peaks, then decreases.
Flat 	Increasing amounts of the sensory attribute have no significant affect on overall liking.

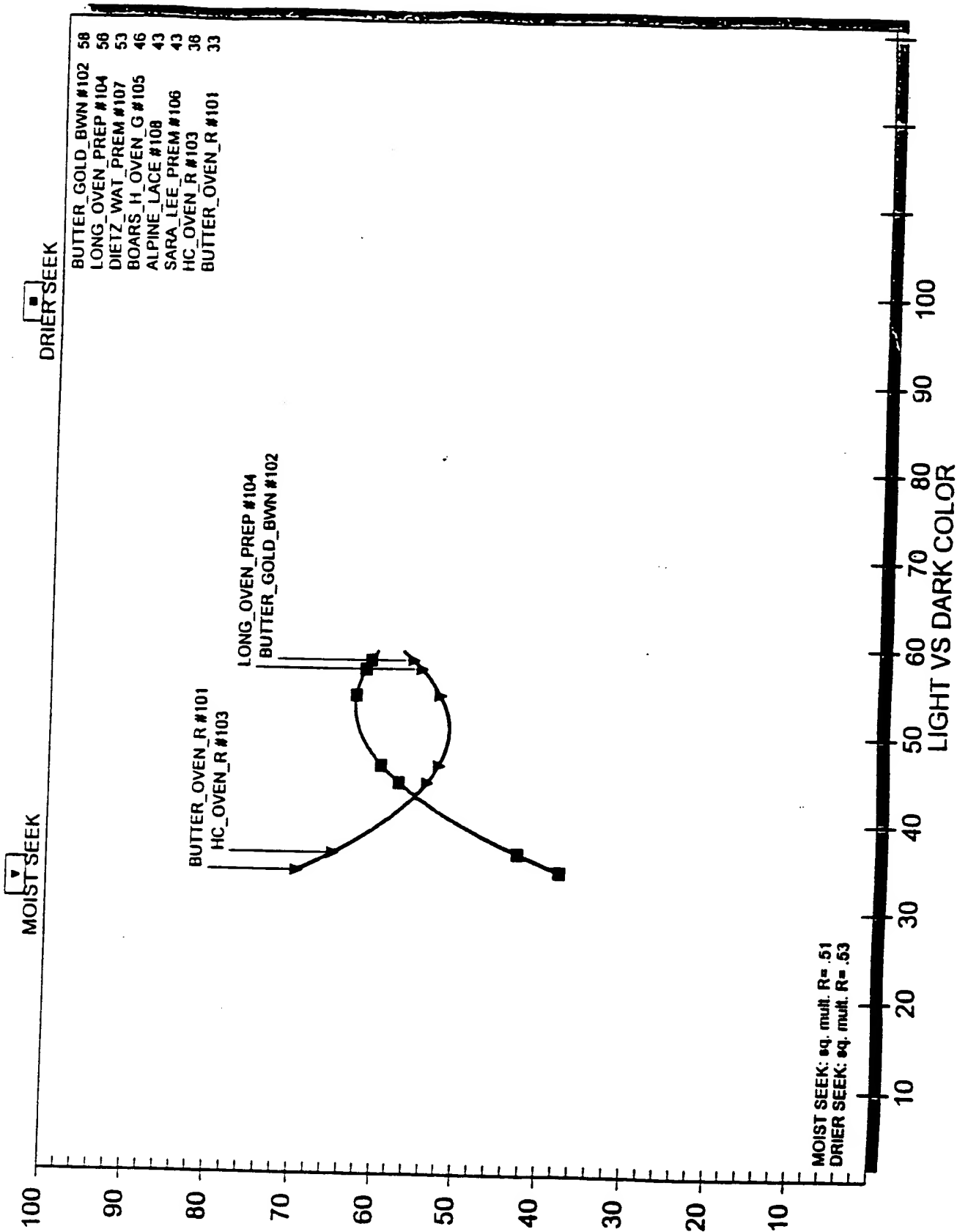
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LIGHT VS DARK COLOR VS LIKING OVERALL

- RANDOM SAMPLE -



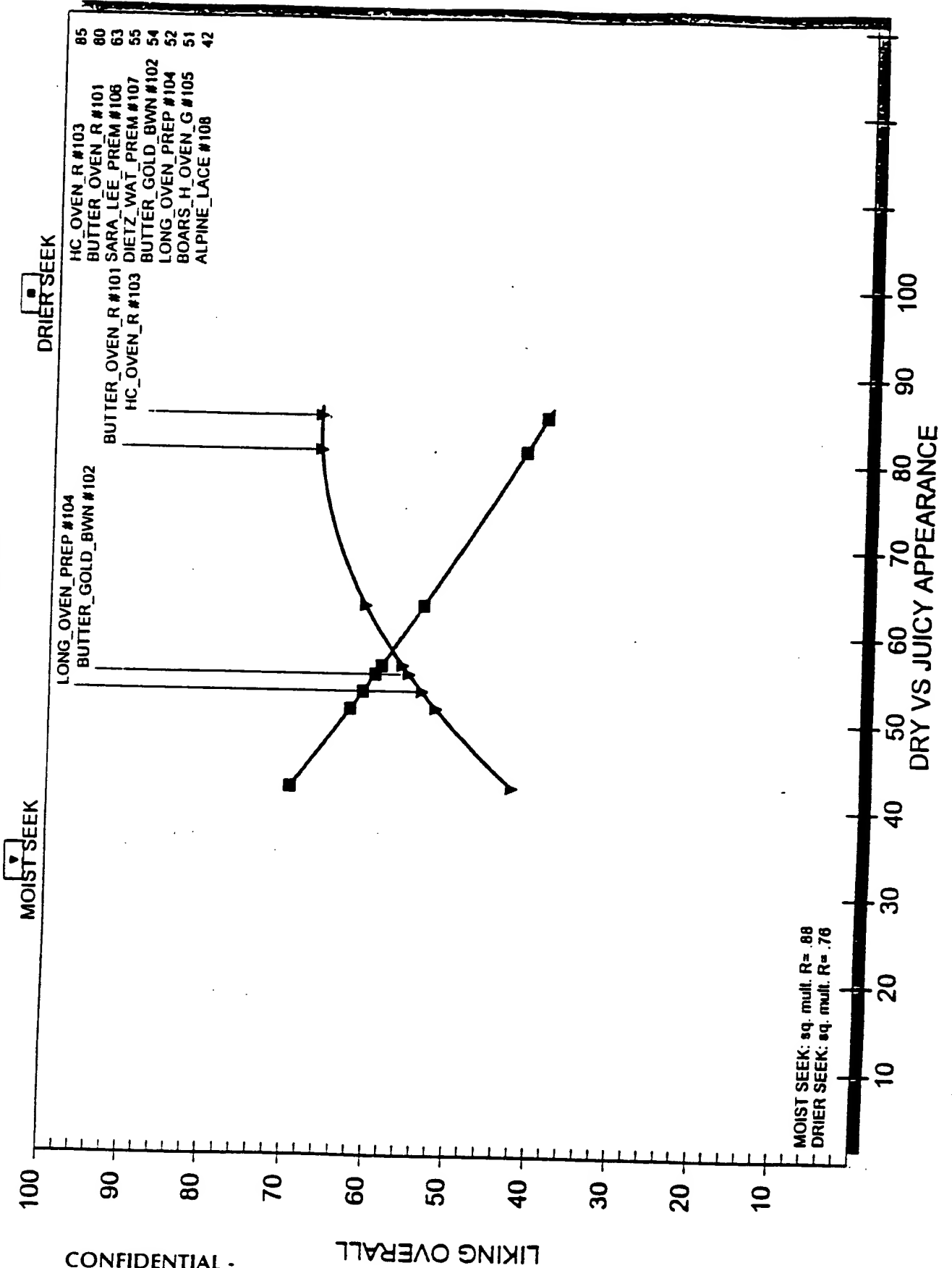
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LIKING OVERALL

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DRY VS JUICY APPEARANCE VS LIKING OVERALL - RANDOM SAMPLE -



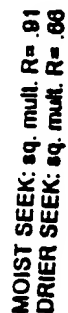
MOIST SEEK: sq. mult. R = .88
DRIER SEEK: sq. mult. R = .78

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- RANDOM SAMPLE -

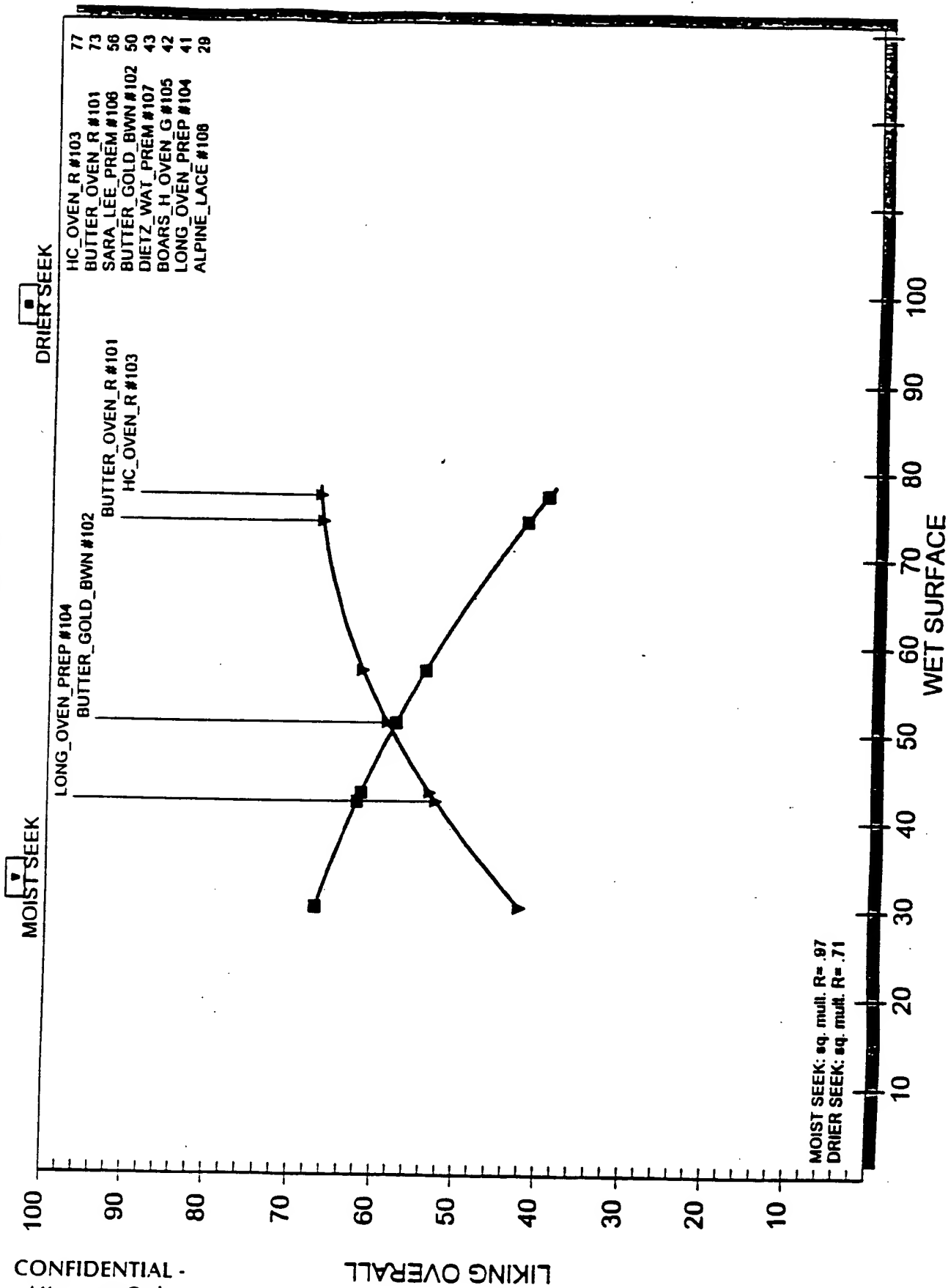


LIKING OVERALL

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WET SURFACE VS LIKING OVERALL

- RANDOM SAMPLE -

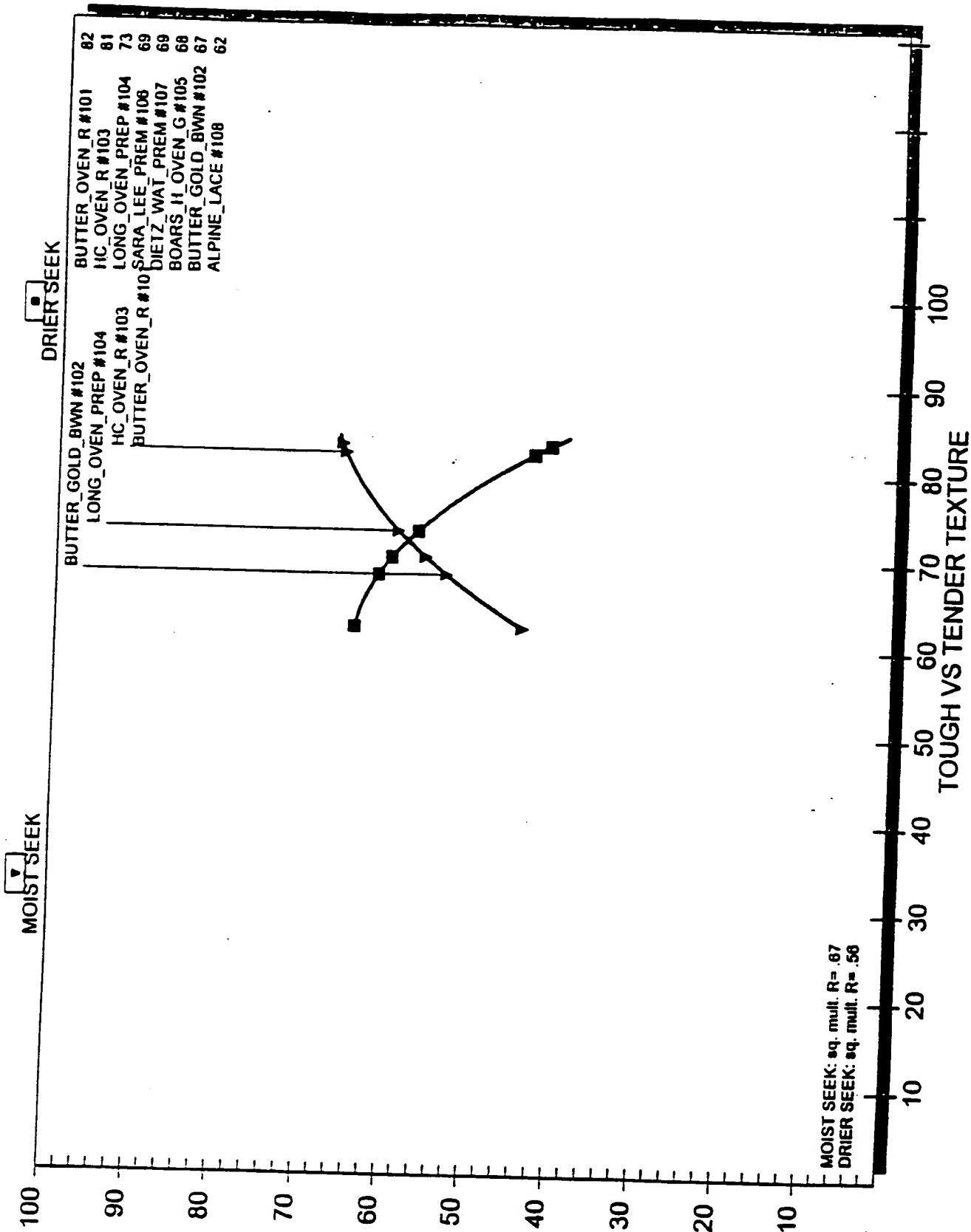


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TOUGH VS TENDER TEXTURE VS LIKING OVERALL

- RANDOM SAMPLE -



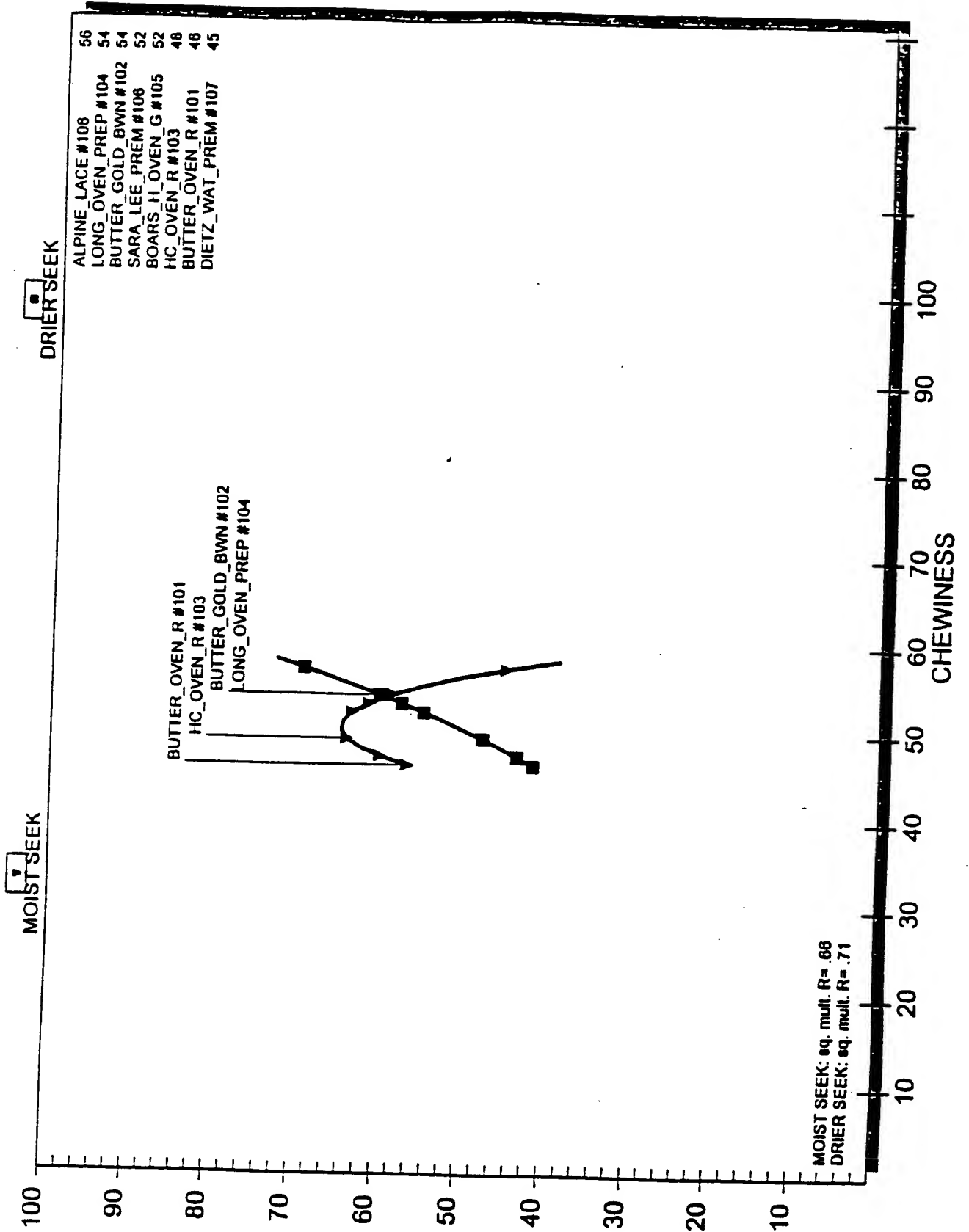
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LIKING OVERALL

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CHEWINESS VS LIKING OVERALL - RANDOM SAMPLE -



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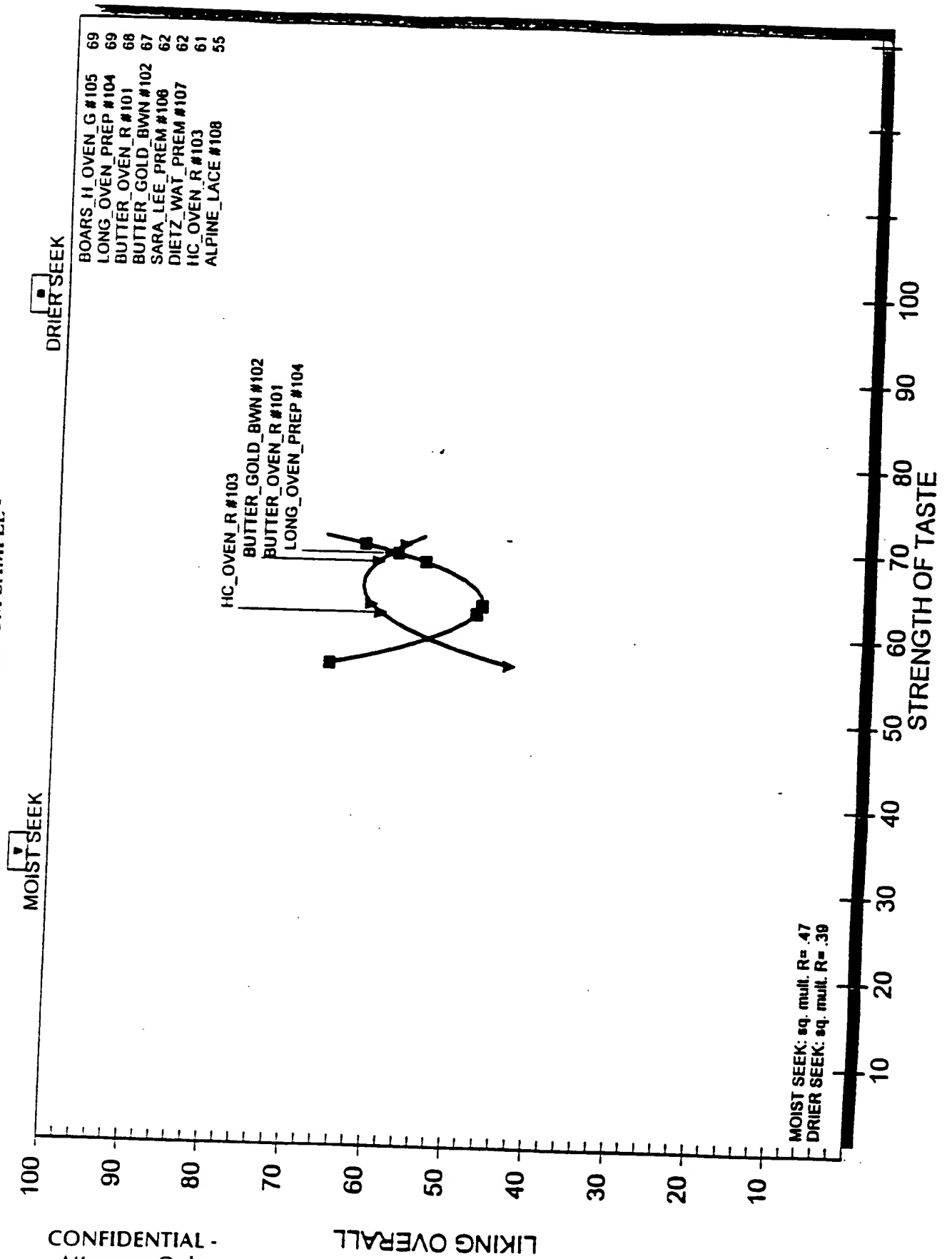
LIKING OVERALL

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STRENGTH OF TASTE VS LIKING OVERALL

- RANDOM SAMPLE -



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WHAT ARE THE SENSORY DRIVERS OF LIKING?

(TURKEY SLICE)

What drives overall liking among the *Moistness/Tenderness* Seekers?

	<u>Overall Liking Was highest as Attribute...</u>	<u>Product(s) At/Near Peak of Liking</u>
Strength of Taste	Increased to a point then decreases	<i>Healthy Choice Oven Roasted, Dietz & Watson, Sara Lee Premium</i>
Wet Surface	Increased	<i>Butterball Oven Roasted, Healthy Choice Oven Roasted</i>
Dry vs. Juicy Texture	Juiciness increased	<i>Butterball Oven Roasted, Healthy Choice Oven Roasted</i>
Dry vs. Juicy Appearance	Appearance wetness increased	<i>Healthy Choice Oven Roasted, Butterball Oven Roasted</i>
Tough vs. Tender	Tenderness increased	<i>Butterball Oven Roasted, Healthy Choice Oven Roasted</i>
Chewiness	Was at mid level	<i>Healthy Choice Oven Roasted</i>
Color	Color was at a lighter level	<i>Butterball Oven Roasted, Healthy Choice Oven Roasted</i>

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PTO-002511

SUMMARY OF ASE POSITION WITHIN MOISTNESS/TENDERNESS SEGMENT (TURKEY SLICE)

Butterball Oven Roasted and Healthy Choice define the peak of the overall liking curves on all sensory drivers of liking for this segment.

These two products are well liked as evidenced by high overall liking scores of 66 and 67 respectively.

They outperform two key competitors: Boar's Head and Alpine Lace and are at parity to Sara Lee.

Conclusion: Based only on the evaluation of individual turkey slices, no product improvement would be indicated for these ASE brands given their performance on a pure product basis. (In absence of branding or positioning)

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PTO-002512

WHAT SENSORY ADVANTAGES WERE PERCEIVED FOR WELL-LIKED ASE PRODUCTS VS. BOAR'S HEAD AND SARA LEE?

- Among Moistness/Tenderness Seekers -

On the basis of the turkey slice evaluation...

Both Healthy Choice and Butterball Oven Roasted have sensory advantages that may be leverageable vs. competition in marketing communication. Both were perceived to be far juicier/wetter and more tender than both key competitors.

Also, fresher, more natural tasting vs. Boar's Head.

	Butterball		Sara Lee	Boar's Head	Sig. Diff. at 95%	Sig. Diff. at 90%
	Healthy Choice	Oven Roasted				
Overall Liking	67	66	63	54	[+/-12]	[+/-10]
Dry vs. Juicy	82	83	68	50	[+/-11]	[+/-9]
Tough vs. Tender	83	81	68	60	[+/-11]	[+/-9]
Wetness	73	72	54	41	[+/-13]	[+/-11]
Fresh Tasting	73	69	73	57	[+/-13]	[+/-11]
Processed vs. Natural Tasting	66	60	66	47	[+/-13]	[+/-11]

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PTO-002513

WHAT ARE THE SENSORY DRIVERS OF LIKING? (TURKEY SLICE)

What drives overall liking among the *Drier/Less Tender* Seekers?

	<u>Overall Liking Was highest as Attribute...</u>	<u>Product(s) At/Near Peak of Liking</u>
Dry vs. Juicy Texture	Juiciness decreased	Alpine Lace
Dry vs. Juicy Appearance	Juiciness decreased	Alpine Lace
Tough vs. Tender Texture	Texture was less tender	Alpine Lace, <i>Butterball Golden Brown</i> , Boar's Head Oven Gold
Chewiness	Increased	Alpine Lace
Surface Wetness	Decreased	Alpine Lace
Color	Peaked at a darker level	<i>Butterball Golden Brown</i> Longmont Oven Prepared, Dietz & Watson Premium

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SUMMARY OF ASE POSITION WITHIN DRIER/LESS TENDER SEGMENT (TURKEY SLICE)

MJI recommends that ASE make no changes to their Longmont product given its high overall liking score of 71 among this segment; an excellent score.

On a pure product basis, in the absence of branding, Longmont:

- Achieves parity on overall liking with Alpine Lace and Boar's Head
- Outperforms Sara Lee and Dietz & Watson

Longmont's performance among this segment may represent an opportunity for ASE to market this brand in grocery deli channels.

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PTO-002515

WHAT SENSORY ADVANTAGES WERE PERCEIVED FOR WELL-LIKED ASE PRODUCTS VS. BOAR'S HEAD AND SARA LEE?

- Among Drier/Less Tender Seekers -

Longmont clearly has some sensory advantages relating to Freshness/Natural/Like Homemade that may be leveragable vs. competition in marketing communication:

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	<u>Longmont</u>	<u>Alpine Lace</u>	<u>Boar's Head</u>	<u>Sig. Diff. Sara Lee</u>	<u>Sig. Diff. at 95%</u>	<u>at 90%</u>
Overall Liking	71	66	64	53	[+/-14]	[+/-12]
Natural Appearance	73	51	60	54	[+/-15]	[+/-13]
Fresh Tasting	78	68	66	60	[+/-15]	[+/-12]
Natural Tasting	71	58	56	62	[+/-15]	[+/-13]
You Would Think It Was Sliced Right From A Homemade Turkey	70	53	61	53	[+/-15]	[+/-13]

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WHOLE BREAST APPEARANCE EVALUATION

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BLIND VISUAL APPEAL OF THE WHOLE BREAST

On the basis of an unbranded whole breast evaluation...

Longmont is clearly regarded as the best looking of the tested products. (Visual appeal cuts across the random sample, Butterball users and both sensory segments.)

Outperforming Boar's Head and all other competitors.

Butterball Golden Brown is also well liked though to a lesser extent.

Scoring at parity to Boar's Head and outperforming all others.

Butterball Oven Roasted and *Healthy Choice* were far and away the least visually appealing turkeys suggesting a vulnerability vs. competitive brands and a potential barrier to trial.

	Liking of Appearance Overall			
	Random Sample	Butterball Users	Molstness/Tenderness Seekers	Drier/Less Tender Seekers
Longmont	68	66	63	73
Butterball Golden Brown	60	58	53	67
Boar's Head Oven Gold	56	58	53	59
Sara Lee	48	46	56	40
Dietz & Watson	48	48	41	55
Alpine Lace	41	42	41	42
Butterball Oven Roasted	21	21	25	17
Healthy Choice	19	20	20	18
Significant Difference at 95% Confidence Level	[+/-10]	[+/-10]	[+/-13]	[+/-14]
Significant Difference at 90% Confidence Level	[+/-8]	[+/-8]	[+/-11]	[+/-12]

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DRIVERS OF LIKING FOR WHOLE TURKEY BREAST

What *sensory* characteristics are Driving Liking of Appearance for the whole breast?

- Darker outer color
- Darker inner color
- More visual grain of meat

Longmont and Butterball Golden Brown define the “optimal” appearance with Healthy Choice and Butterball Oven Roasted at the opposite extreme on all these characteristics.

Two imagery attributes are also clearly driving overall liking of appearance for Longmont:

- Natural looking shape
- Appearance similar to homemade

Longmont defines the “optimal” appearance with Healthy Choice and Butterball Oven Roasted at the opposite extreme on both characteristics.

These patterns are consistent across both sensory segments.

Implication:

Given that Healthy Choice and Butterball Oven Roasted are well liked on appearance, taste and texture *when evaluated as a slice*, opportunity exists to improve the appearance as a whole breast.

- Given that the whole breast appearance influences the purchase decision at the deli counter, improvement should enhance trial.

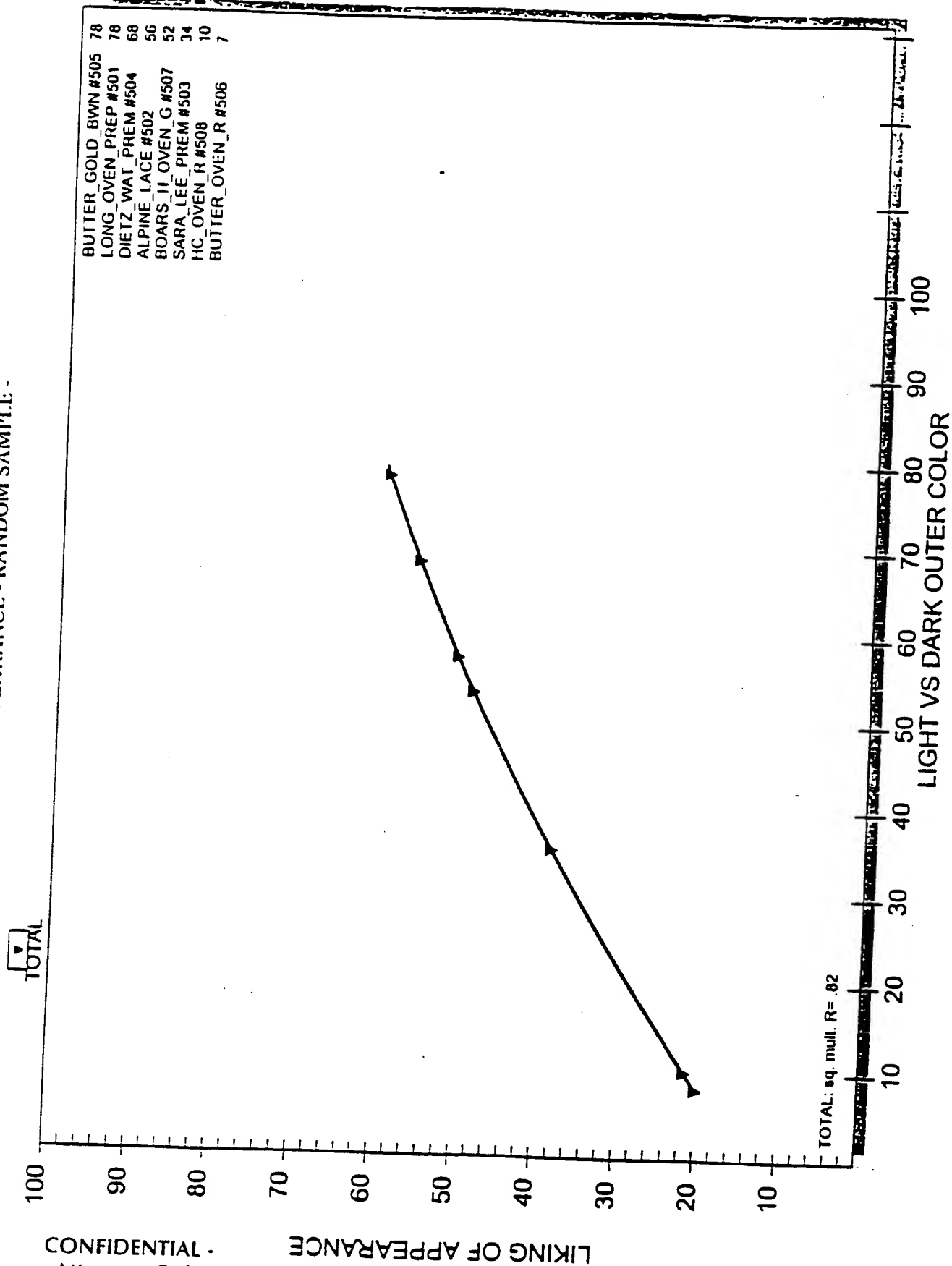
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PTO-002519

LIGHT VS DARK OUTER COLOR VS LIKING OF APPEARANCE

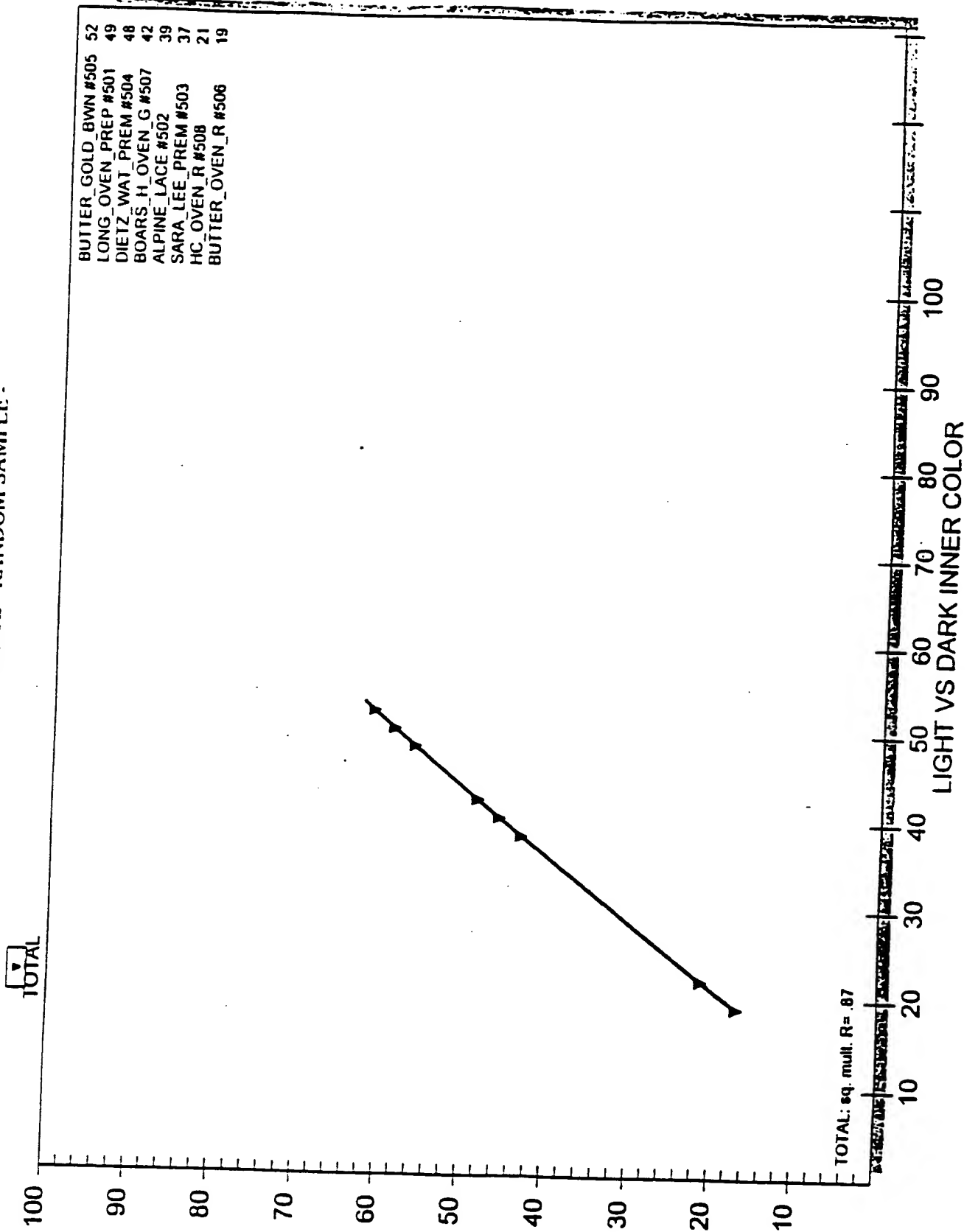
- BLIND APPEARANCE - RANDOM SAMPLE -



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PTO-002520

LIGHT VS DARK INNER COLOR VS LIKING OF APPEARANCE - BLIND APPEARANCE - RANDOM SAMPLE -



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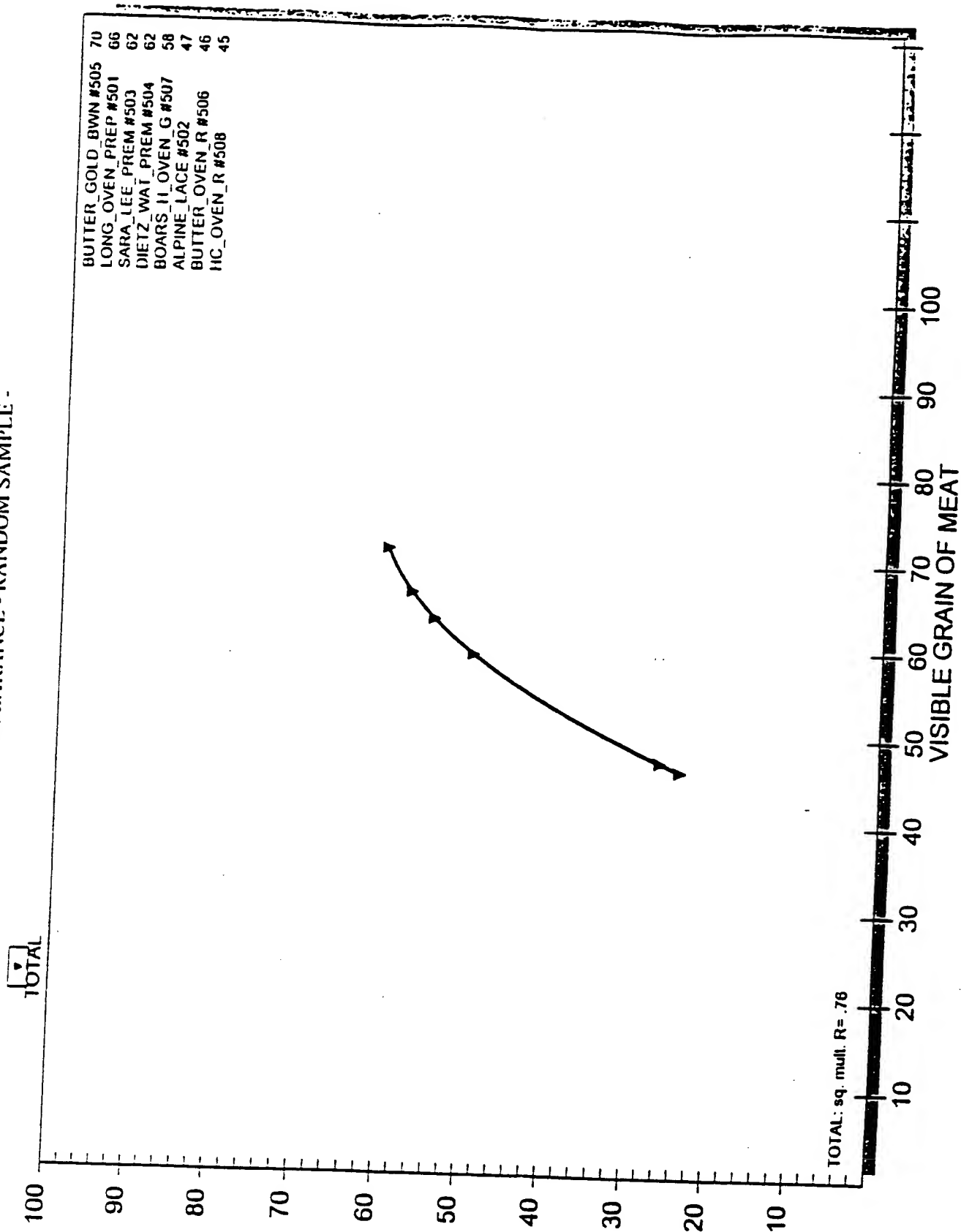
LIKING OF APPEARANCE

CRPF04980

PTO-002521

VISIBLE GRAIN OF MEAT VS LIKING OF APPEARANCE

- BLIND APPEARANCE - RANDOM SAMPLE -



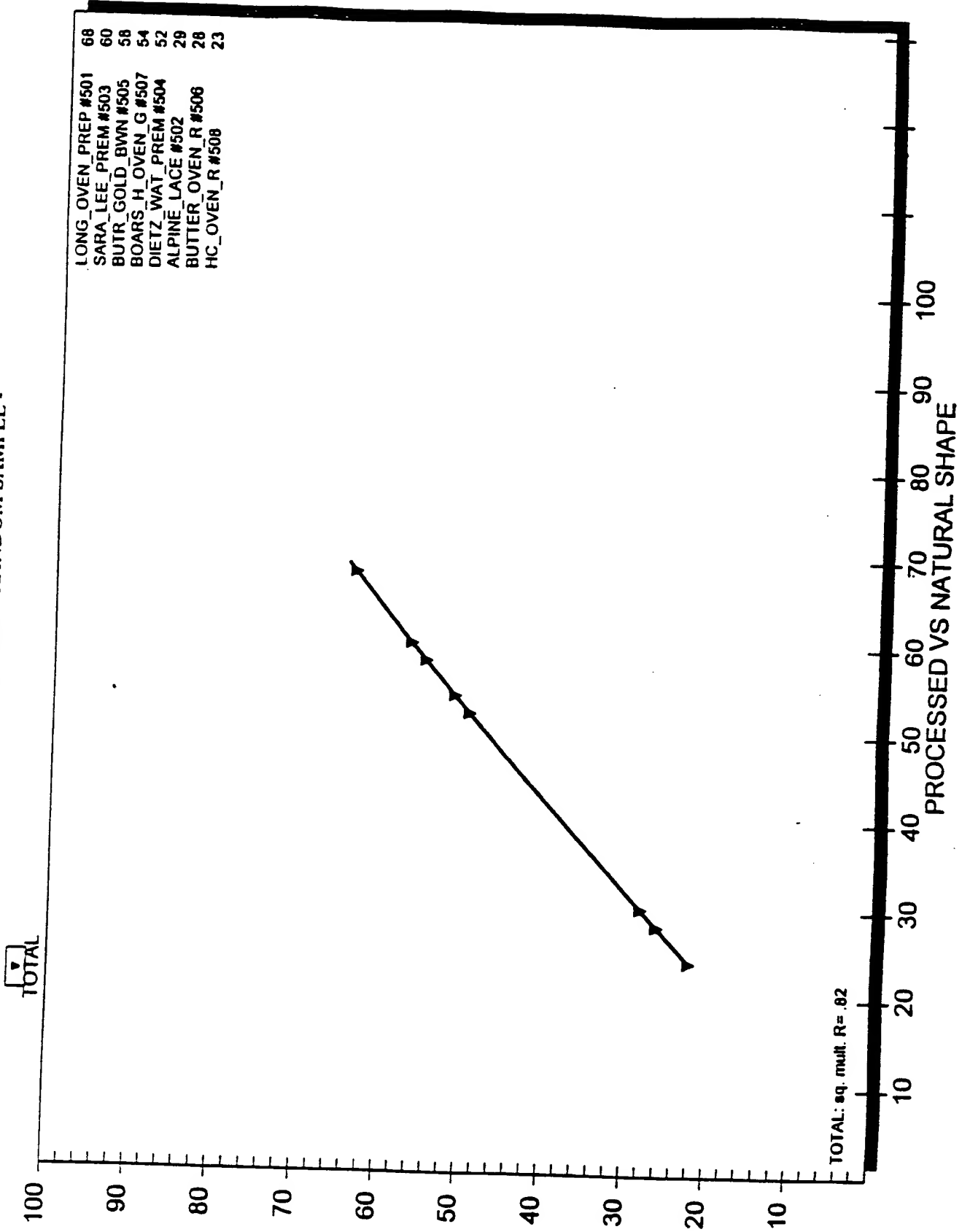
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LIKING OF APPEARANCE

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PTO-002522

PROCESSED VS NATURAL SHAPE VS LIKING OF APPEARANCE - BLIND APPEARANCE - RANDOM SAMPLE -

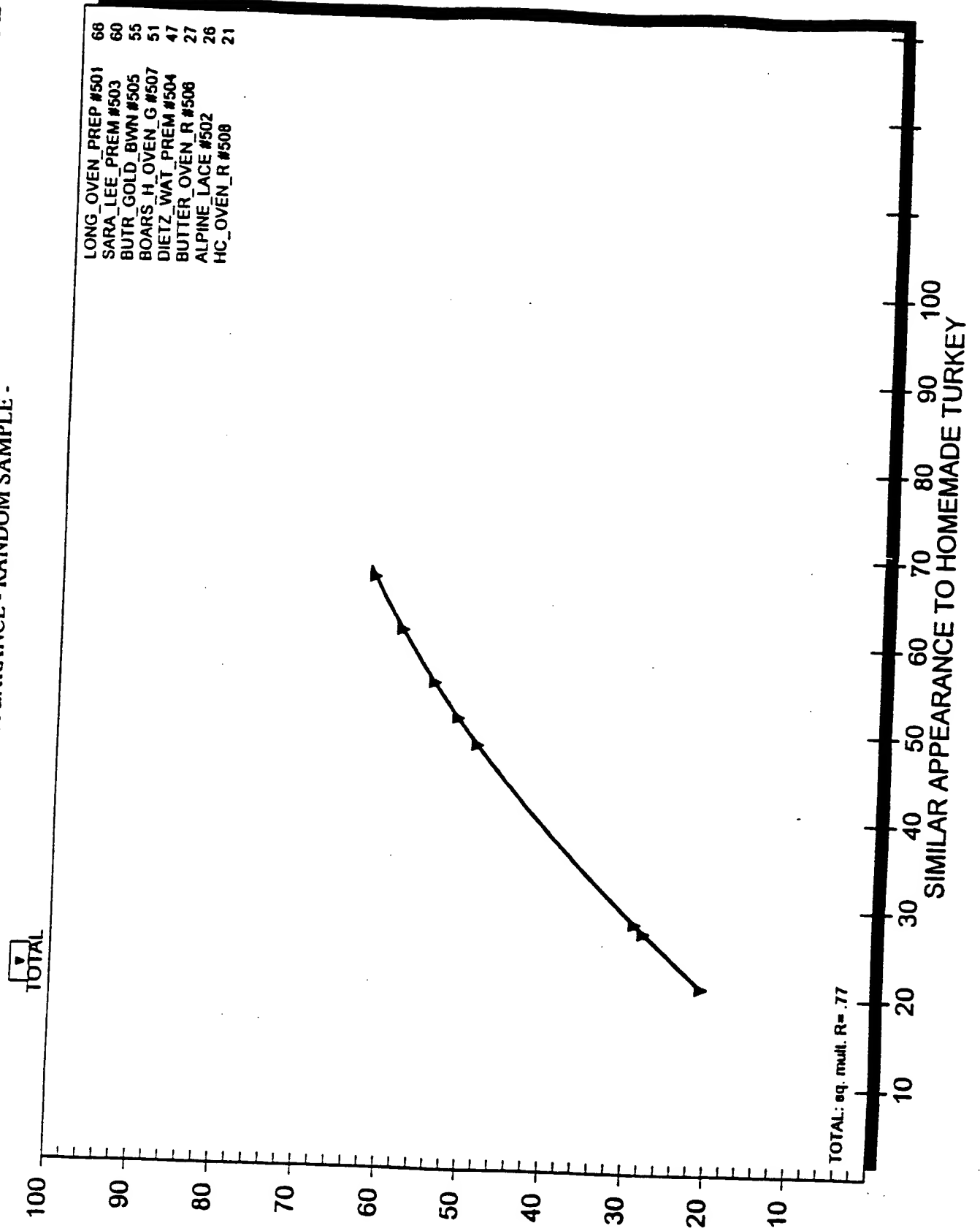


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PTO-002523

SIMILAR APPEARANCE TO HOMEMADE TURKEY VS LIKING OF APPEARANCE - BLIND APPEARANCE - RANDOM SAMPLE -



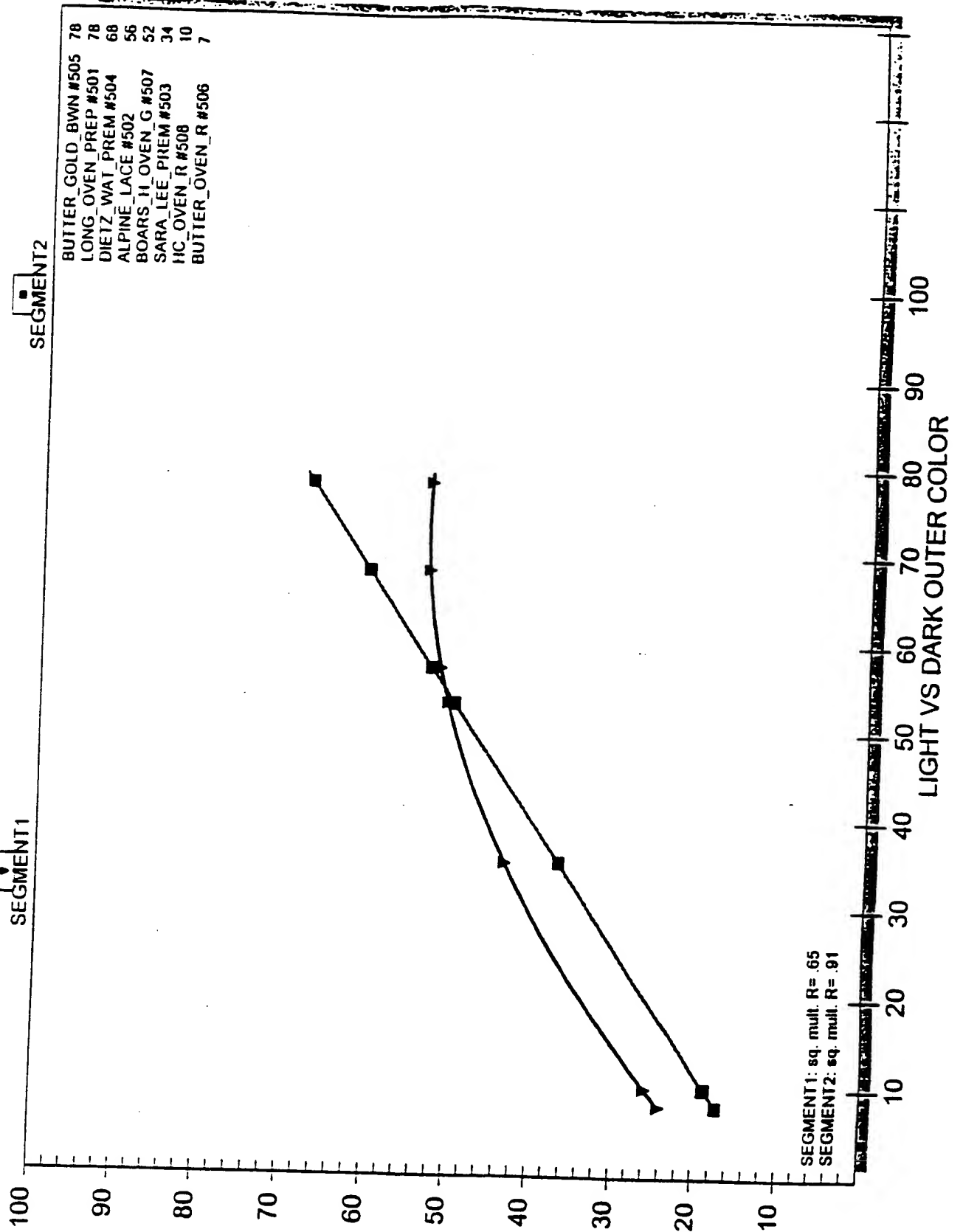
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LIKING OF APPEARANCE

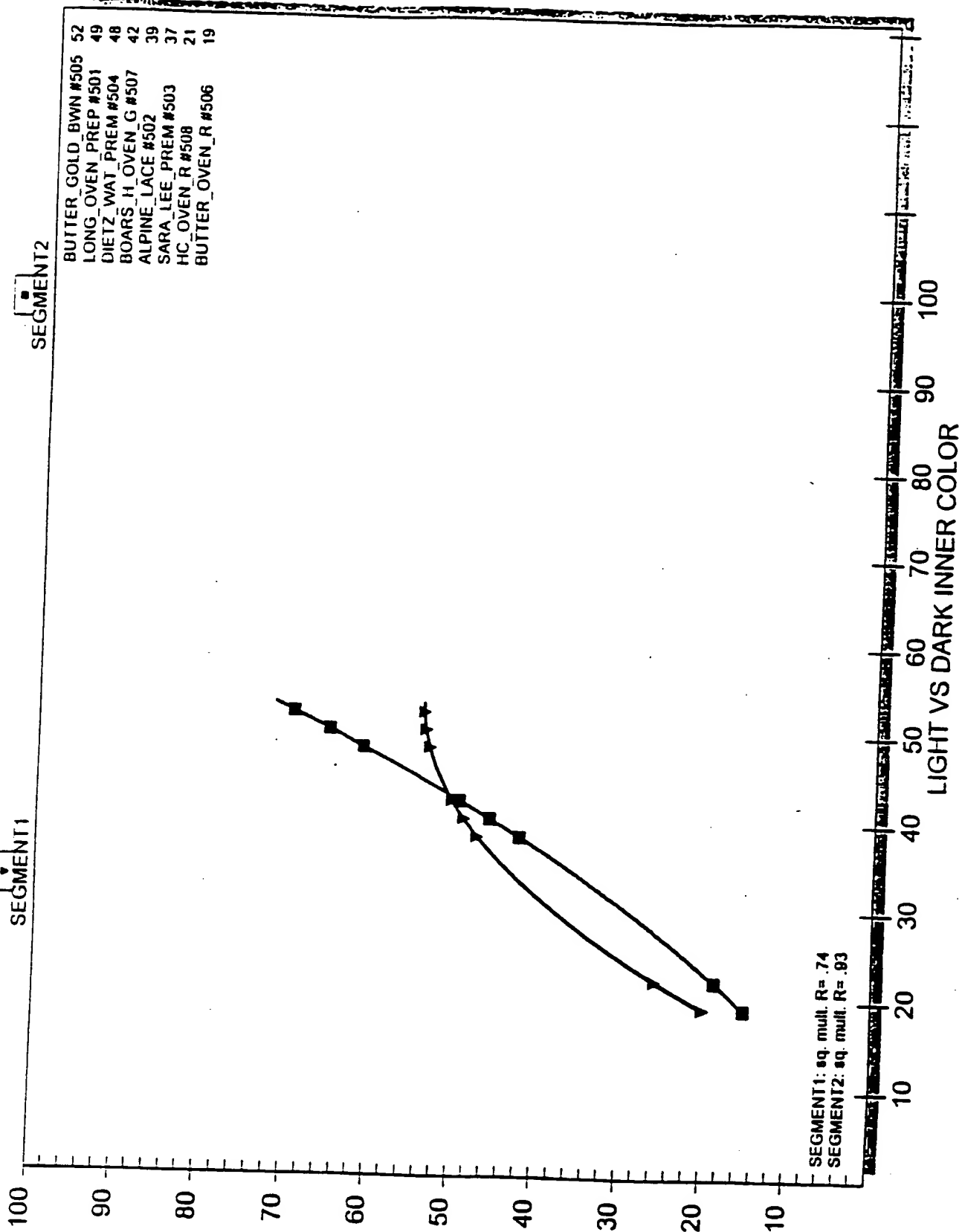
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PTO-002524

LIGHT VS DARK OUTER COLOR VS LIKING OF APPEARANCE - BLIND APPEARANCE - RANDOM SAMPLE -

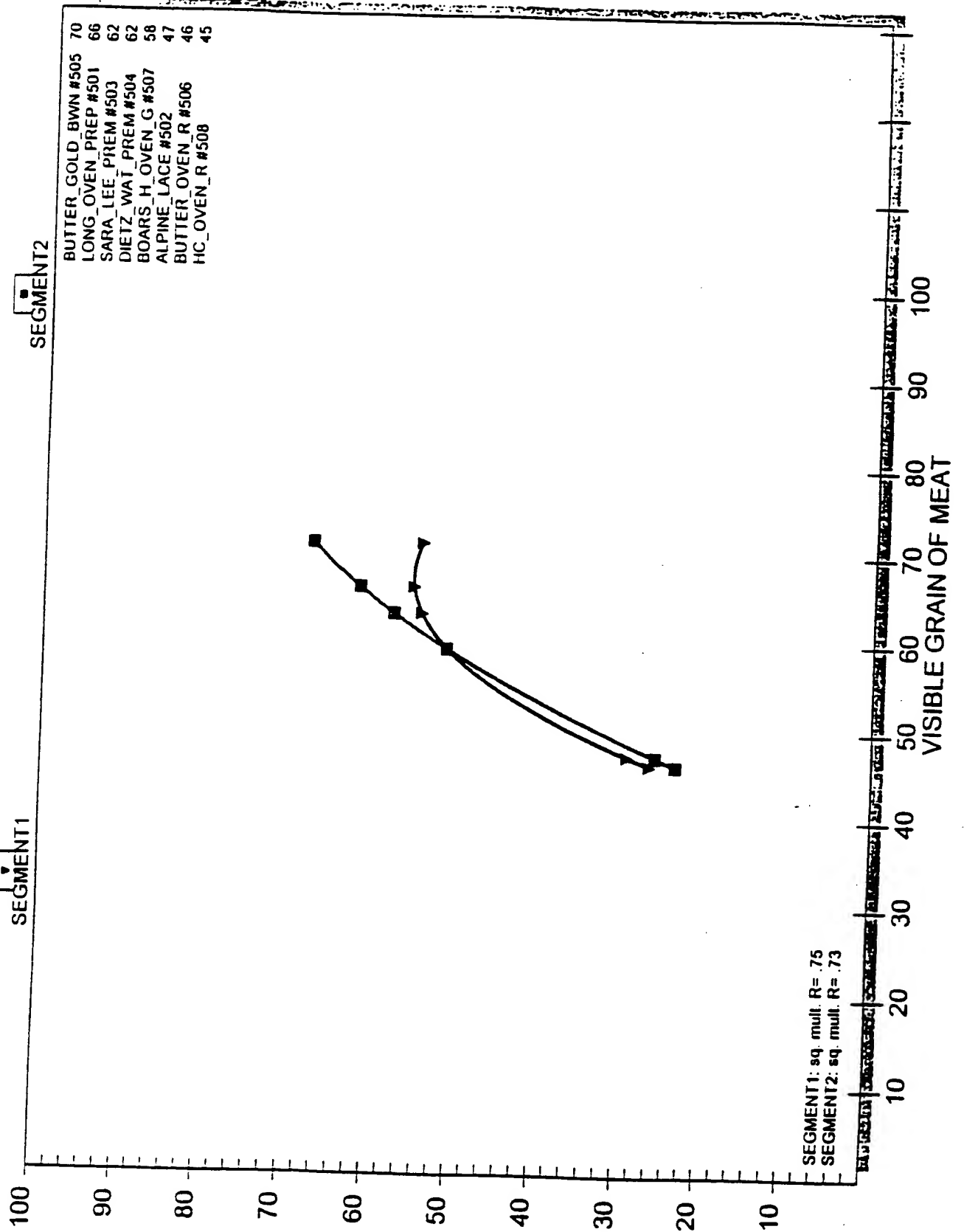


LIGHT VS DARK INNER COLOR VS LIKING OF APPEARANCE - BLIND APPEARANCE - RANDOM SAMPLE -

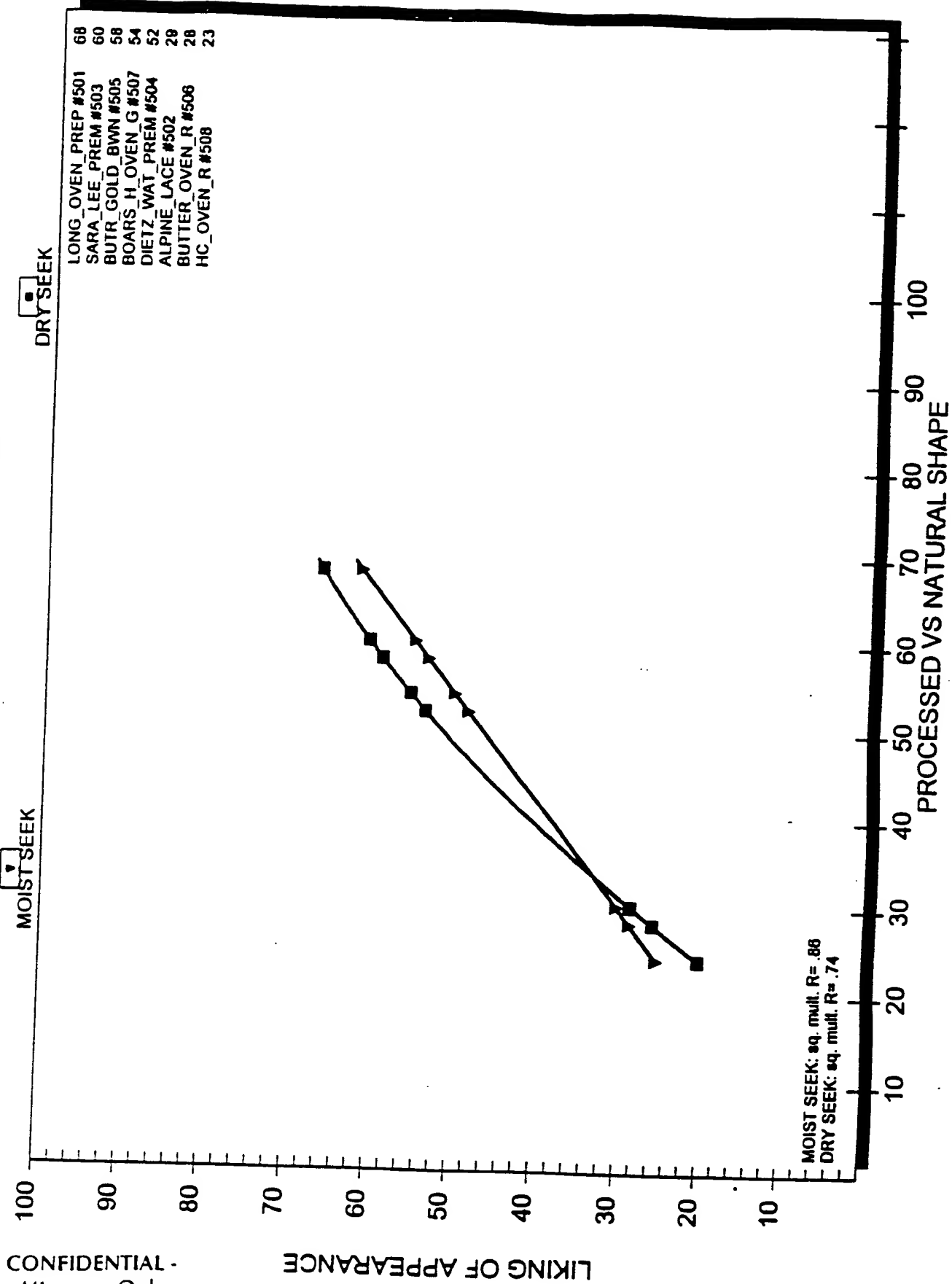


VISIBLE GRAIN OF MEAT VS LIKING OF APPEARANCE

- BLIND APPEARANCE - RANDOM SAMPLE -



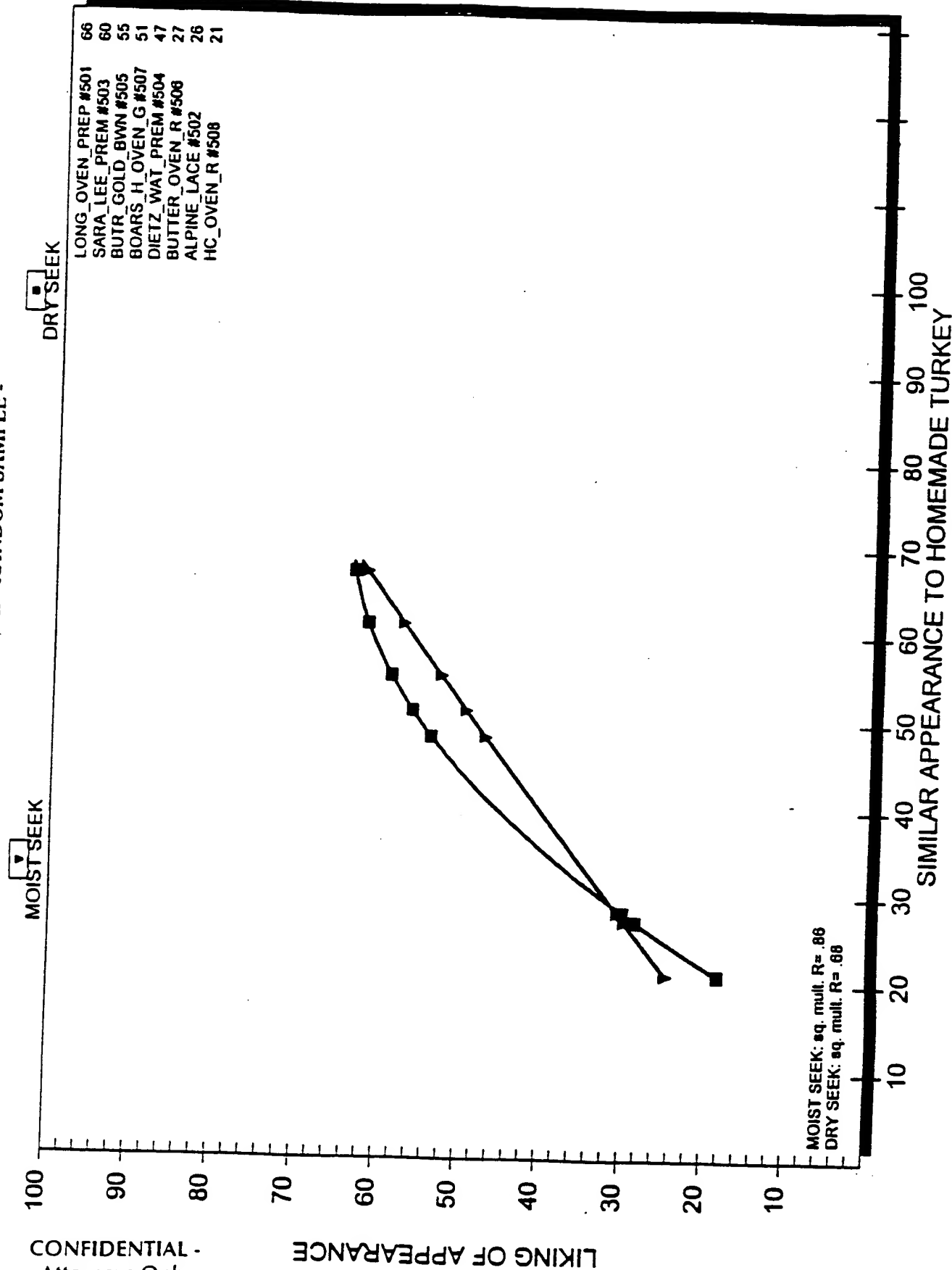
PROCESSED VS NATURAL SHAPE VS LIKING OF APPEARANCE - BLIND APPEARANCE - RANDOM SAMPLE -



CRPF04987

PTO-002528

SIMILAR APPEARANCE TO HOMEMADE TURKEY VS LIKING OF APPEARANCE - BLIND APPEARANCE - RANDOM SAMPLE -

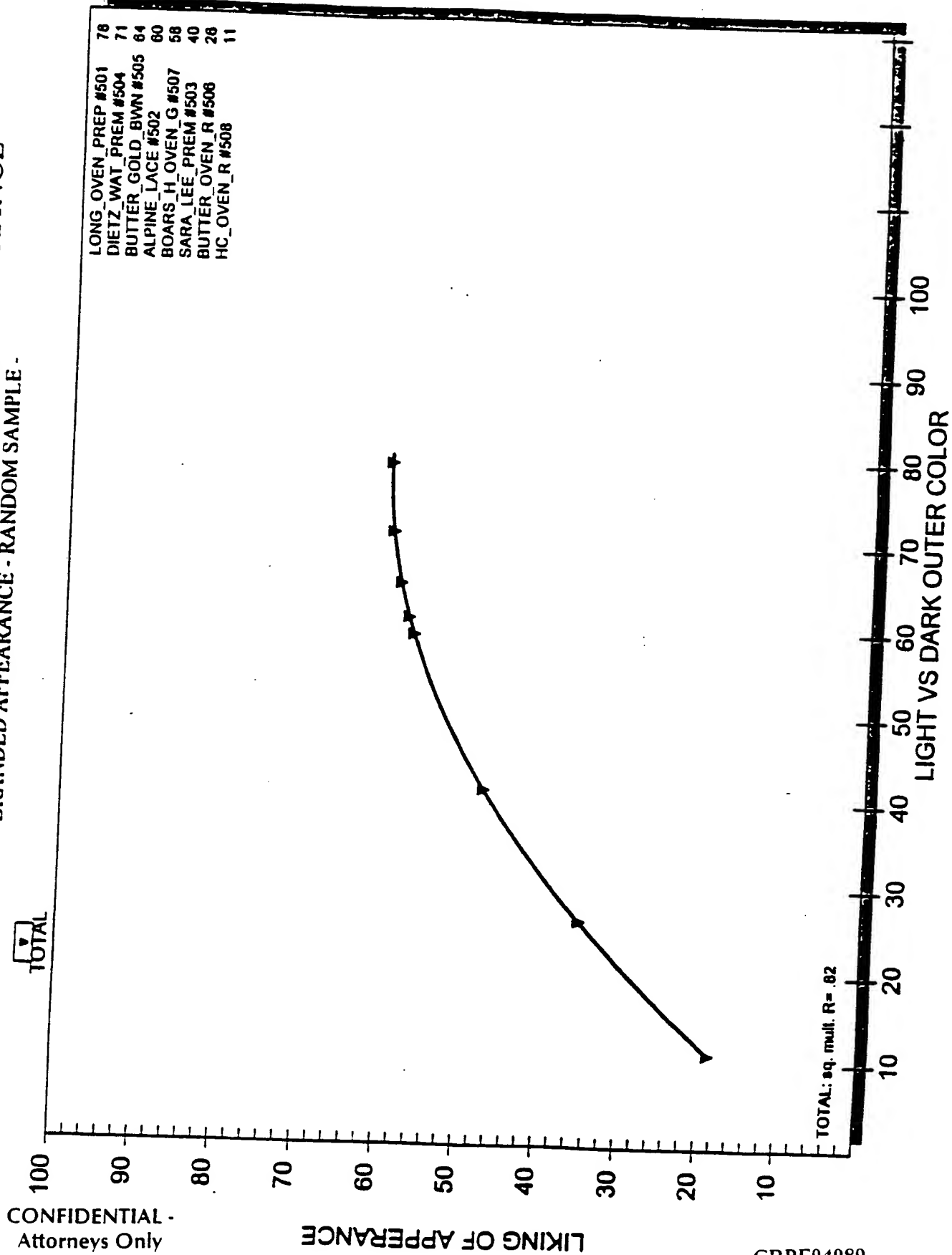


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LIGHT VS DARK OUTER COLOR VS LIKING OF APPEARANCE - BRANDED APPEARANCE - RANDOM SAMPLE -



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LIKING OF APPEARANCE

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LIGHT VS DARK INNER COLOR VS LIKING OF APPEARANCE - BRANDED APPEARANCE - RANDOM SAMPLE -

TOTAL

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LIKING OF APPEARANCE

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PTO-002531

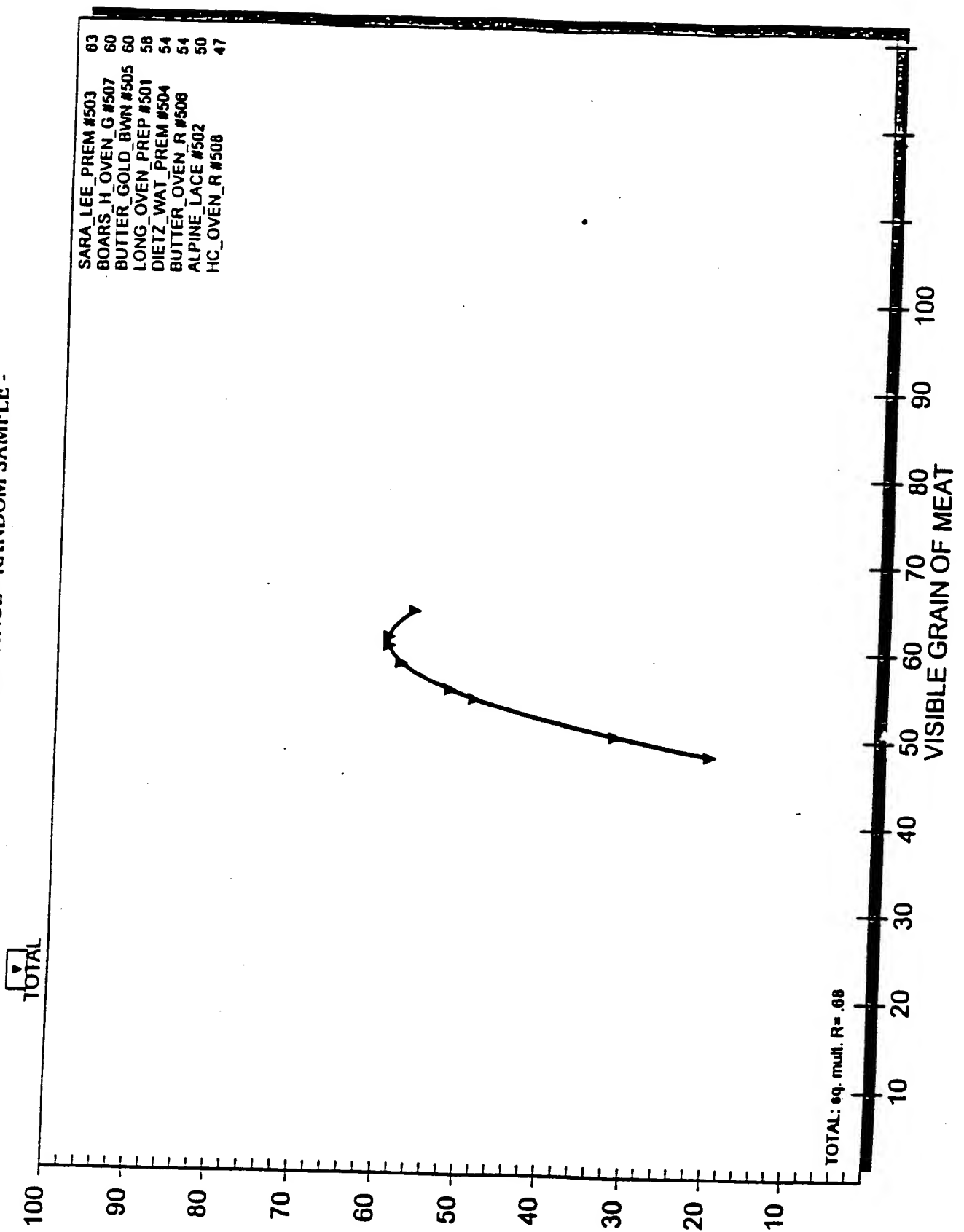
LONG_OVEN_PREP #501 48
 BUTTER_GOLD_BWN #505 48
 DIETZ_WAT_PREM #504 43
 BOARS_H_OVEN_G #507 42
 ALPINE_LACE #502 40
 SARA_LEE_PREM #503 38
 BUTTER_OVEN_R #508 31
 HC_OVEN_R #508 21

TOTAL: sq. mult. R = .88

LIGHT VS DARK INNER COLOR

VISIBLE GRAIN OF MEAT VS LIKING OF APPERANCE

- BRANDED APPEARANCE - RANDOM SAMPLE -



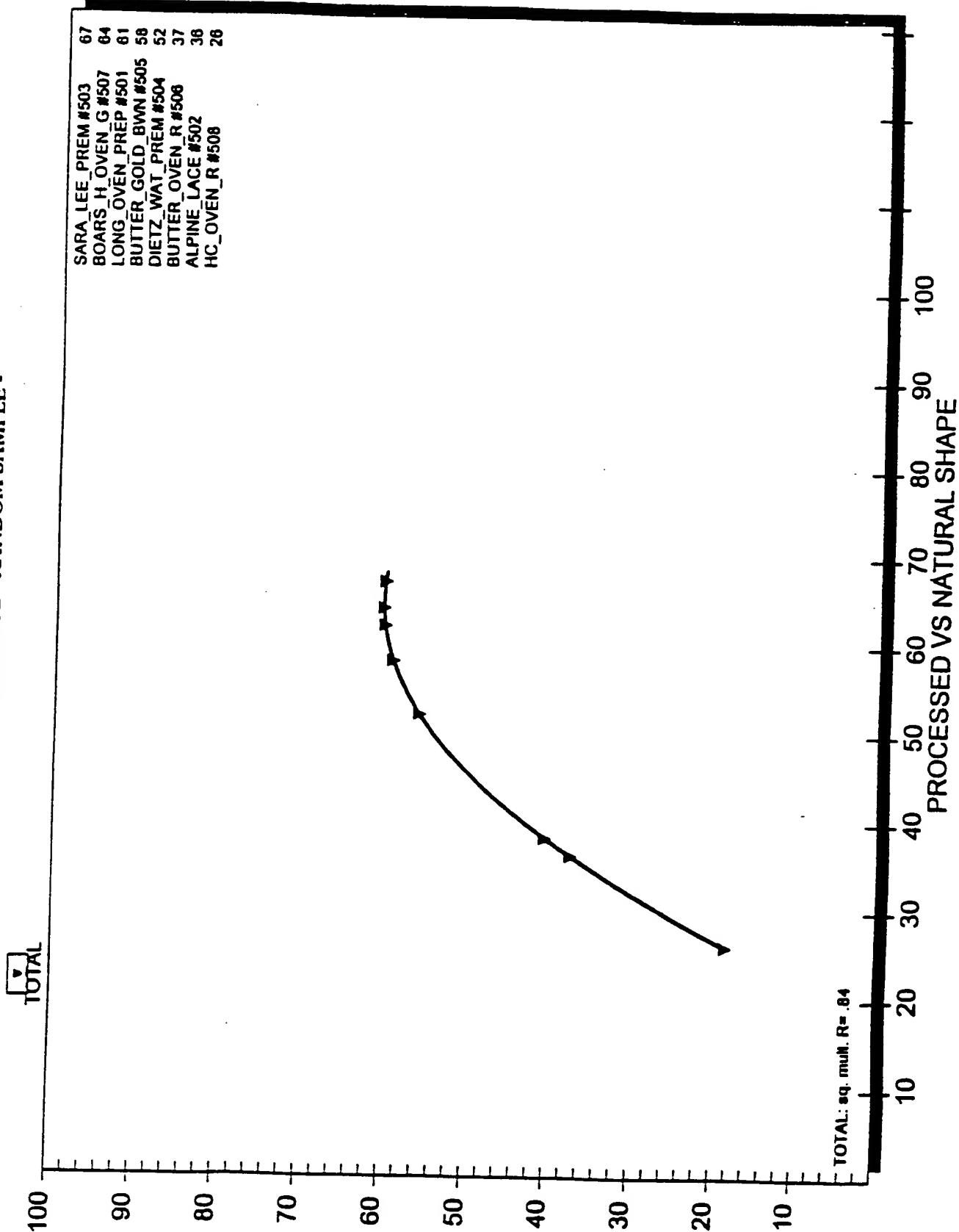
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LIKING OF APPERANCE

CRPF04991

PTO-002532

PROCESSED VS NATURAL SHAPE VS LIKING OVERALL - BRANDED APPEARANCE - RANDOM SAMPLE -



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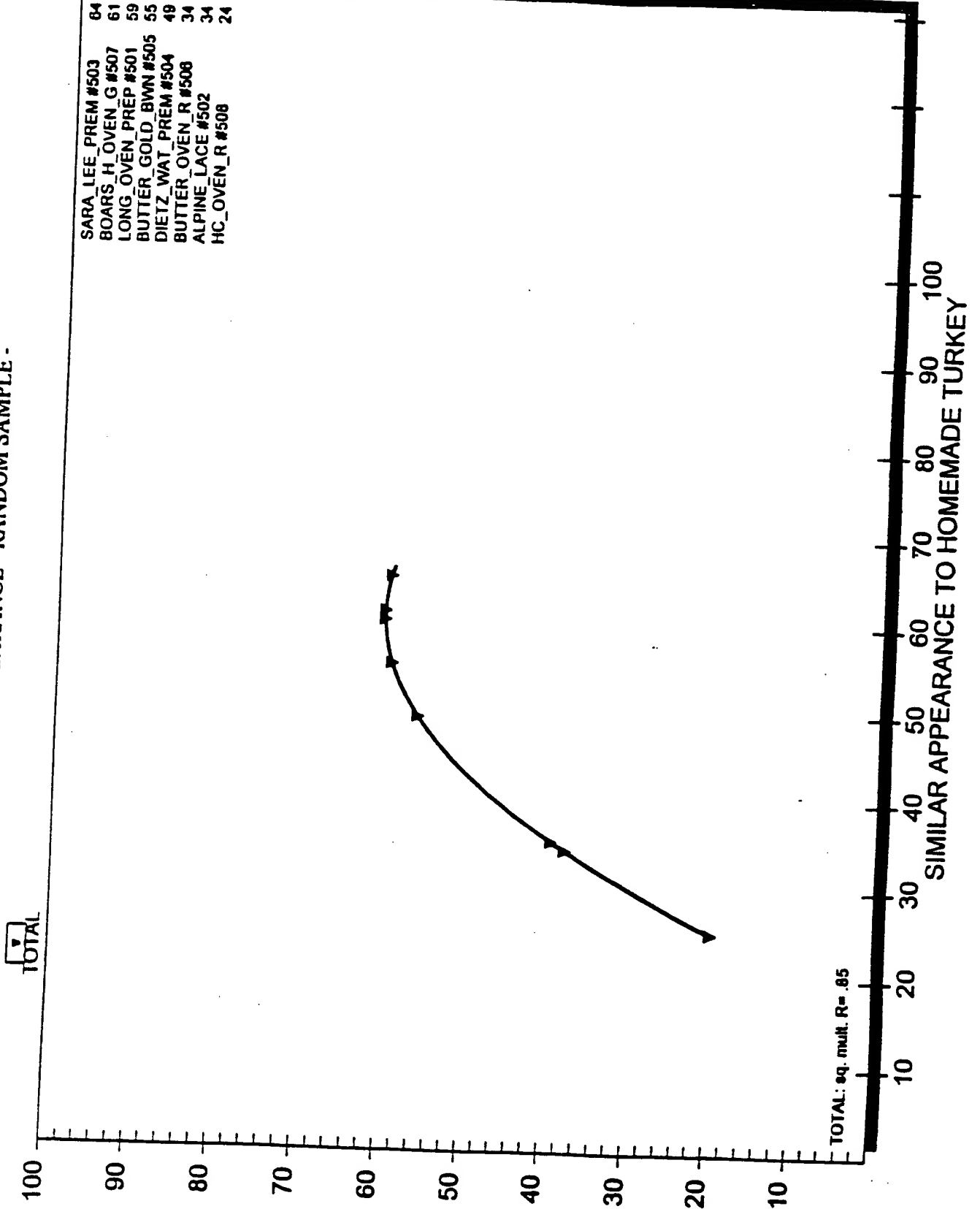
LIKING OVERALL

CRPF04992

PTO-002533

SIMILAR APPEARANCE TO HOMEMADE TURKEY VS LIKING OVERALL

- BRANDED APPEARANCE - RANDOM SAMPLE -



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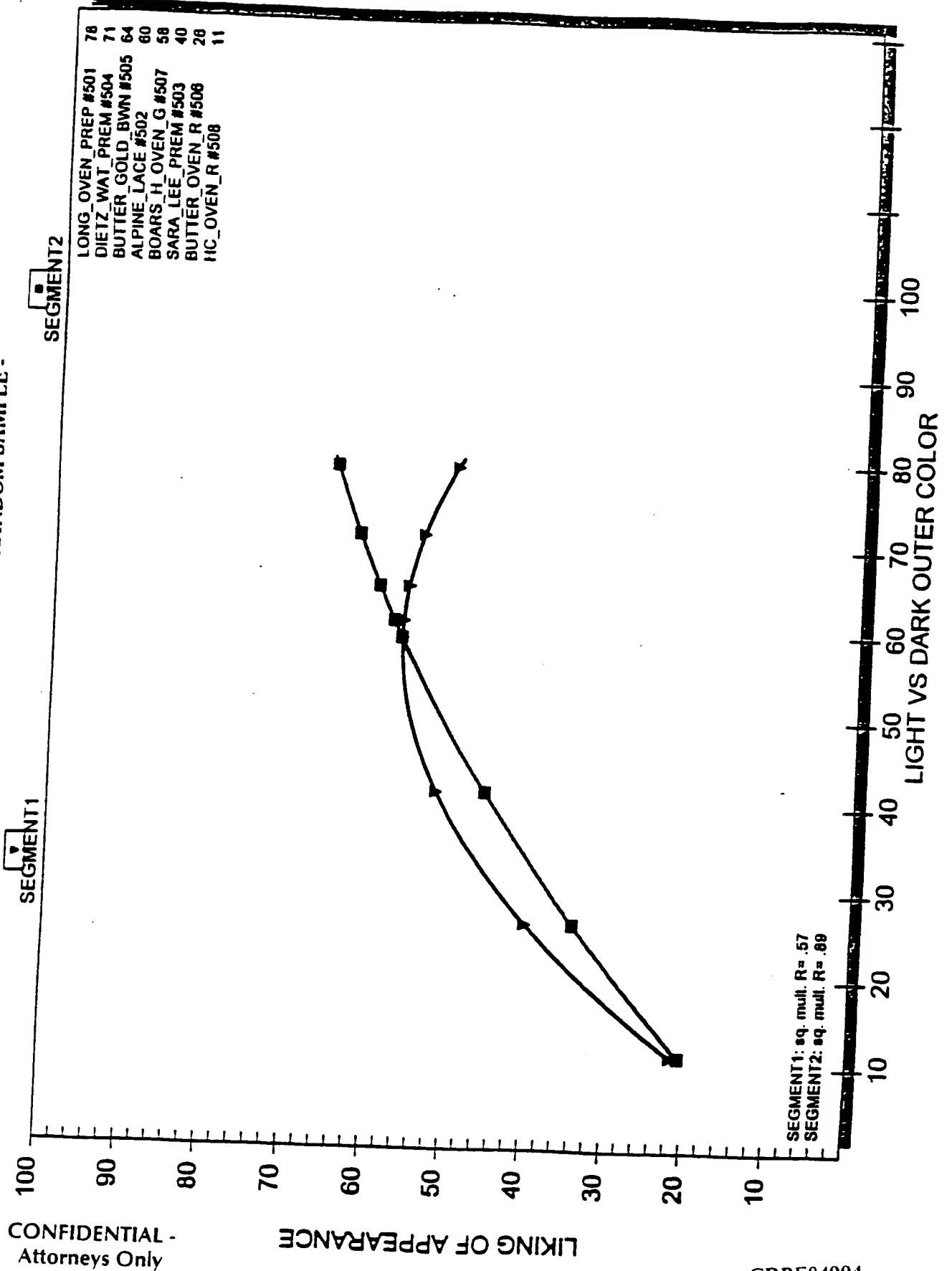
LIKING OVERALL

CRPF04993

PTO-002534

LIGHT VS DARK OUTER COLOR VS LIKING OF APPEARANCE

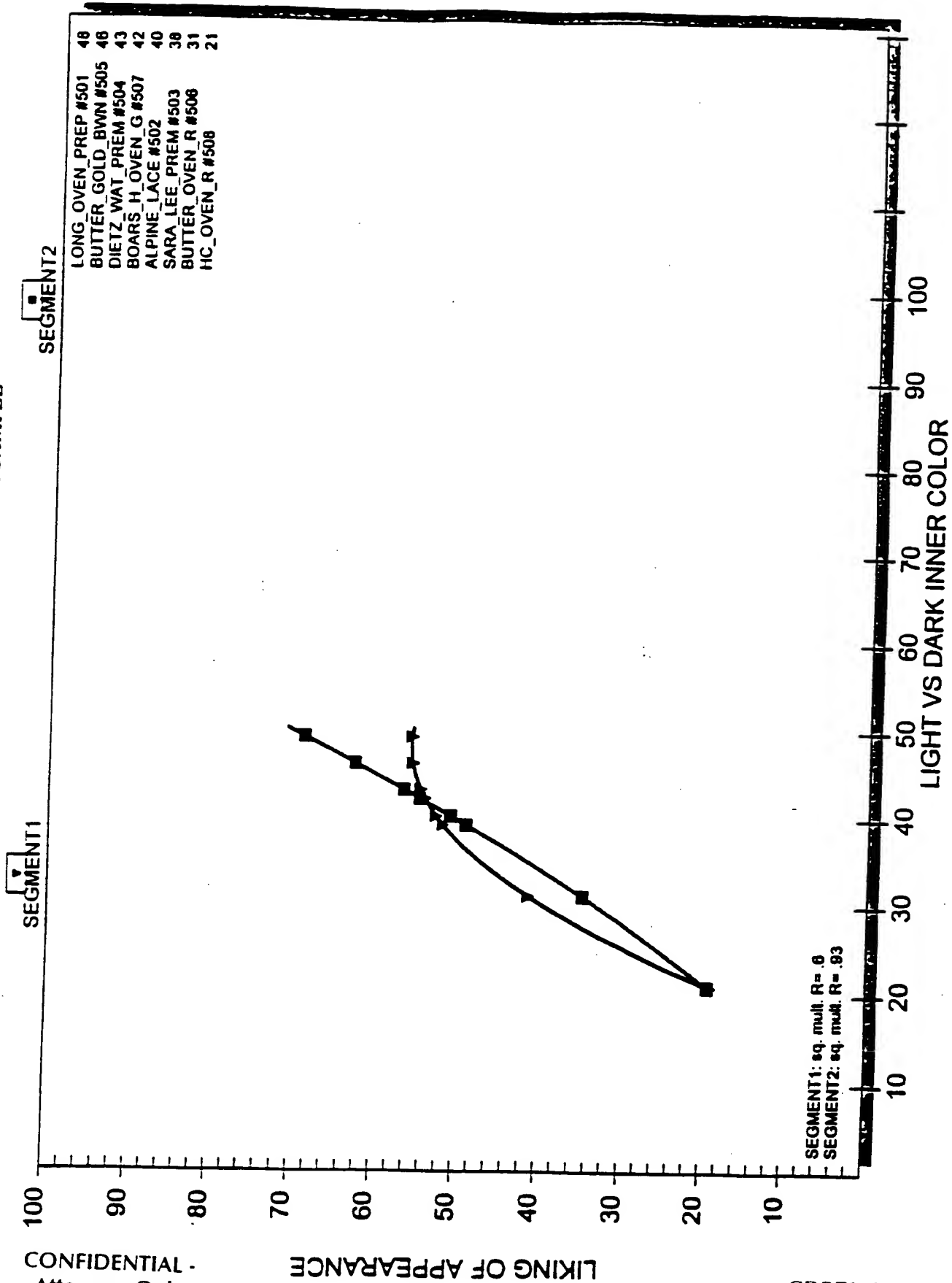
- BRANDED APPEARANCE - RANDOM SAMPLE -



CRPF04994

PTO-002535

LIGHT VS DARK INNER COLOR VS LIKING OF APPEARANCE - BRANDED APPEARANCE - RANDOM SAMPLE -

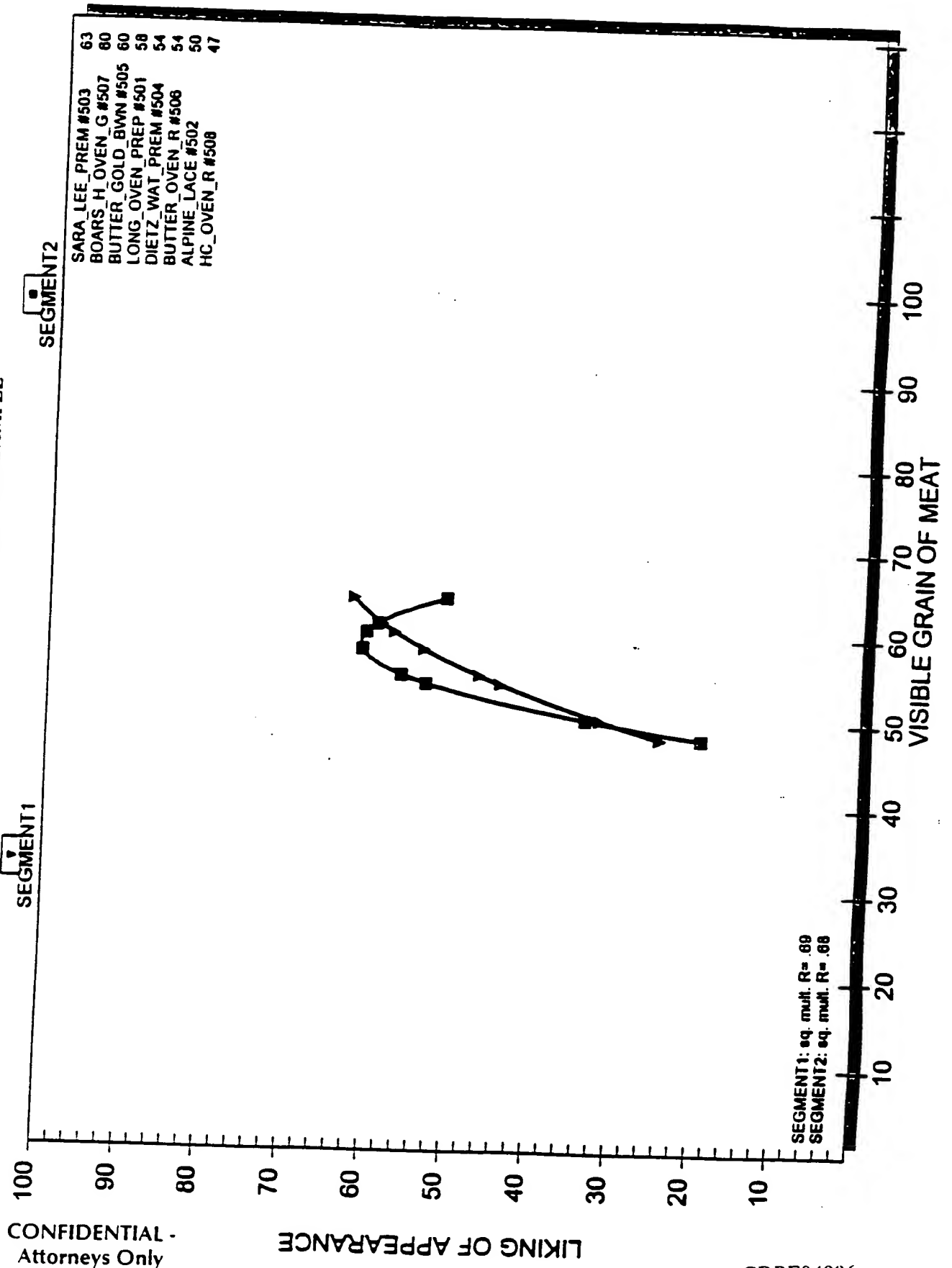


CRPF04995

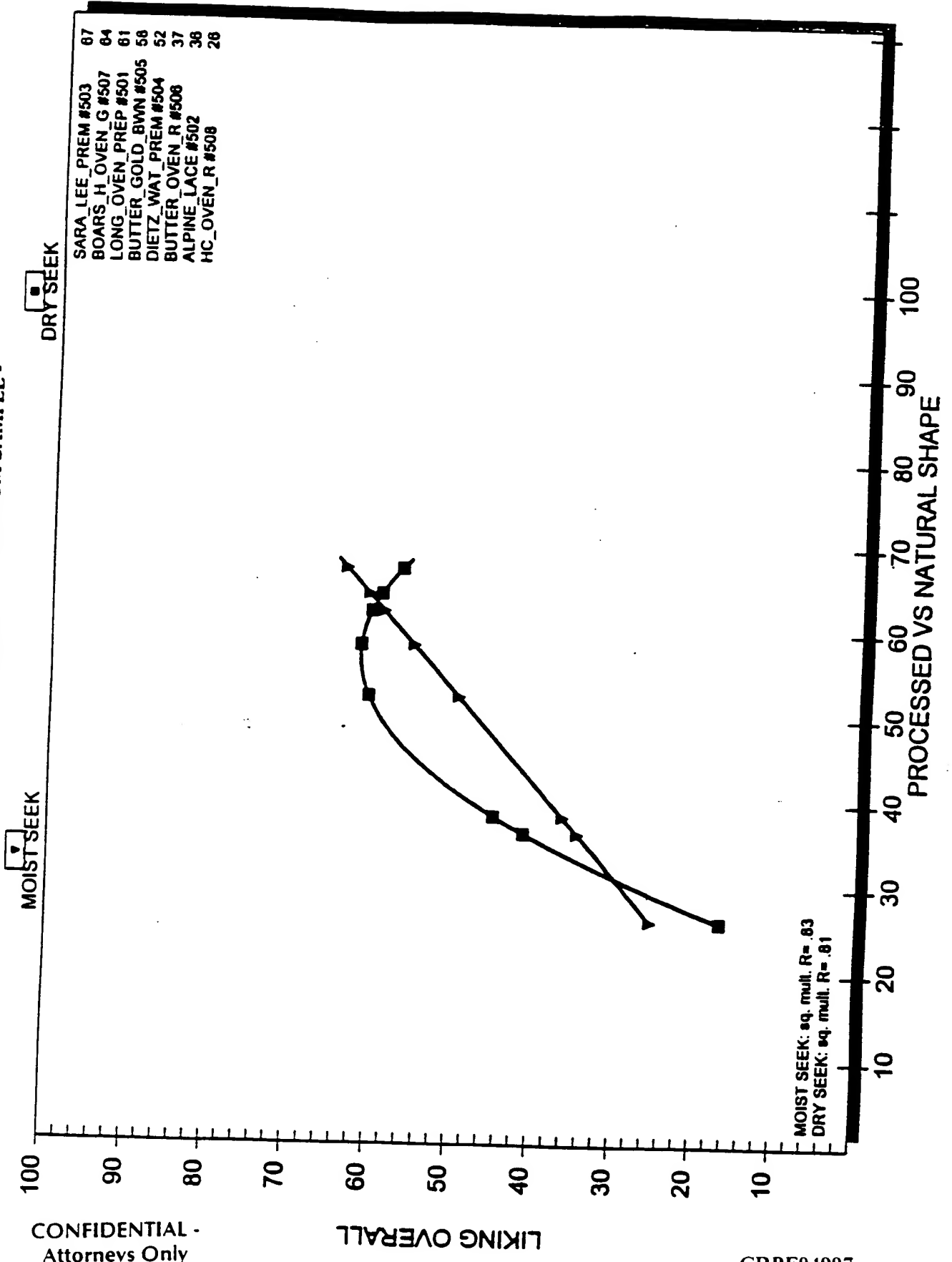
PTO-002536

VISIBLE GRAIN OF MEAT VS LIKING OF APPEARANCE

- BRANDED APPEARANCE - RANDOM SAMPLE -



PROCESSED VS NATURAL SHAPE VS LIKING OVERALL - BRANDED APPEARANCE - RANDOM SAMPLE -



- SARA_LEE_PREM #503 67
- BOARS_H_OVEN_G #507 64
- LONG_OVEN_PREP #501 61
- BUTTER_GOLD_BWN #505 58
- DIETZ_WAT_PREM #504 52
- BUTTER_OVEN_R #508 37
- ALPINE_LACE #502 36
- HC_OVEN_R #508 28

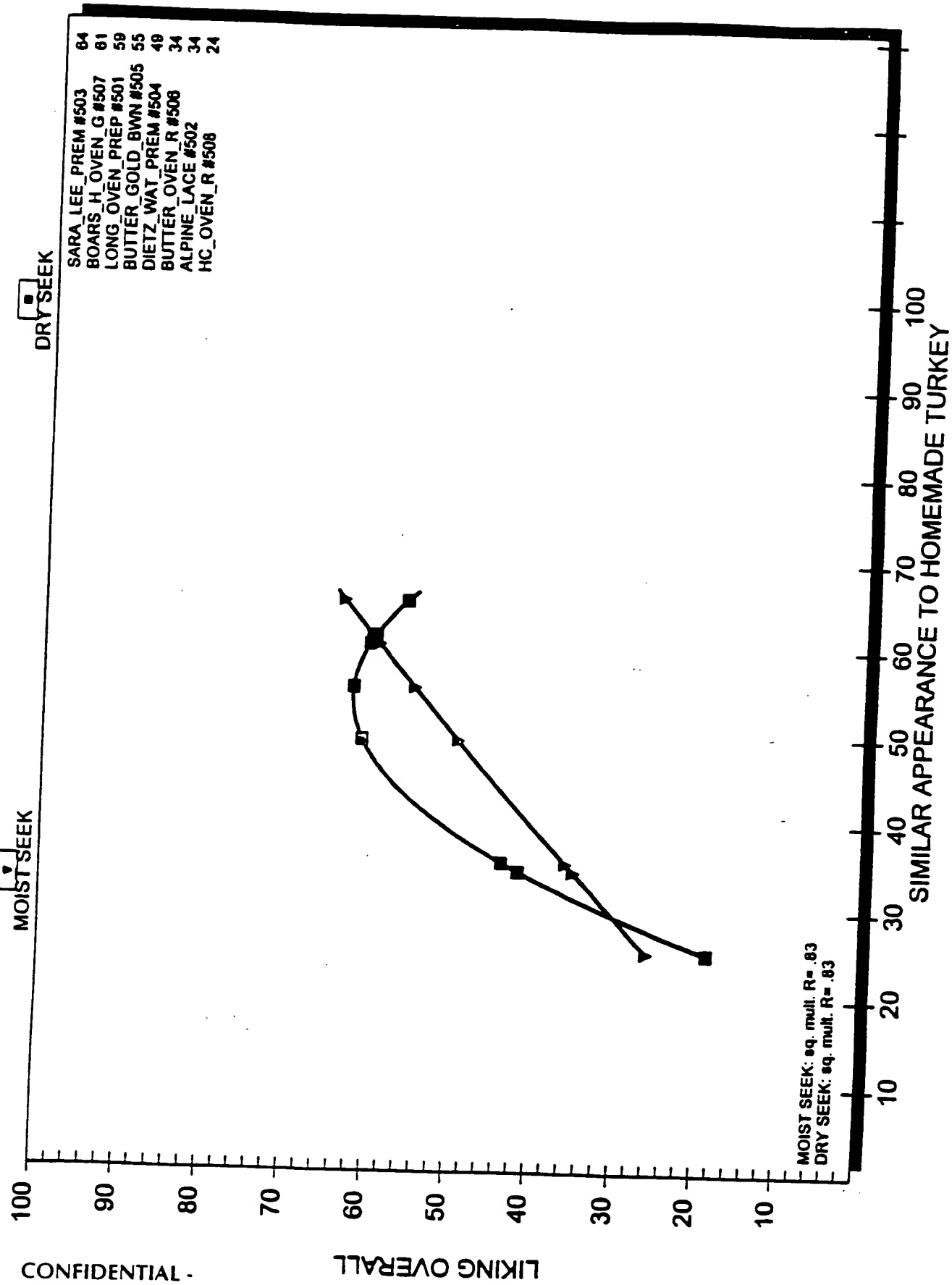
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SIMILAR APPEARANCE TO HOMEMADE TURKEY VS LIKING OVERALL

- BRANDED APPEARANCE - RANDOM SAMPLE -



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IMPACT OF BRANDING

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WHAT IS THE IMPACT OF BRANDING ON OVERALL LIKING OF THE WHOLE TURKEY BREAST?

Approach

Each of the products tested for visual appeal unbranded were also tested branded.

Comparing the unbranded vs. branded performance aids in determining the impact the brand name has on visual appeal.

- This analysis has been done on the random sample and among Butterball users.

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THE IMPACT OF BRANDING - Among The Random Sample-

The Boar's Head brand name had a substantial positive impact on consumer liking of appearance of the whole turkey breast.

- On an unbranded basis, Boar's Head Oven Gold was rated significantly lower than Longmont.
 - ♦ When branded, overall visual appeal increases 12 points (56-68) bringing it to parity with Longmont.
- The Boar's Head name enhances imagery characteristics of a more natural and homemade appearance.

The positive impact of the Butterball name was limited to the Butterball Oven Roasted enhancing liking of appearance (+15pts.) though it remains at far lower levels than other brands.

The Healthy Choice brand name had no impact, which is not surprising given that it is a niche product.

Interestingly, if you're a good product, an unknown brand name does not appear to have a negative impact, as evidenced by the Longmont scores.

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LIKING OF OVERALL APPEARANCE OF THE DELI TURKEY BREAST PRODUCTS - VISUAL EVALUATION
- RANKED BY RANDOM SAMPLE BLIND -

Product Number	Product Description	Random Sample			Butterball Users			
		Judgments Per Product->	Blind (71)	Branded (71)	Difference	Blind (66)	Branded (66)	Difference
501	Longmont Oven Prepared Breast		68	63	-5	66	65	-1
505	Butterball Golden Brown		60	54	-6	58	59	+1
507	Boar's Head Oven Gold		56	68	+12	58	66	+8
503	Sara Lee Premium		48	53	+5	46	54	+8
504	Dietz & Watson Premium		48	52	+4	48	56	+8
502	Alpine Lace Fat Free		41	45	+4	42	53	+11
506	Butterball Oven Roasted		21	36	+15	21	34	+12
508	Healthy Choice Oven Roasted		19	21	+2	20	19	-1

Significant difference at the 95% confidence level
Significant difference at the 90% confidence level

[+/-10]	[+/-10]	[+/-10]
[+/-8]	[+/-8]	[+/-9]

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APPENDIX

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SEQUENCE OF ACTIVITIES

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SEQUENCE OF ACTIVITIES

Respondents were pre-recruited via telephone to MJJ's DesignLab® facilities. Upon arrival for the study they were rescreened to ensure that they met the study qualifications.

Respondents were seated in groups of 17 at individual computer workstations.

- Respondents participated in a cracker practice exercise as a group. This exercise along with the moderator guidance served to familiarize the respondents with the types of questions being asked and the rating scales.

Taste Evaluation - Blind

- Table interviewers served the respondents the products indicated on their computer screen. (Pre-programmed in advance according to a rotation schematic)

Respondents received two slices of folded deli turkey breast on a labeled 9 inch plate. The slicer was set to 3/32".

The moderator took the respondents through the first few questions together as a group.

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SEQUENCE OF ACTIVITIES

- continued -

Taste Evaluation - Blind (continued)

Respondents evaluated 8 out of 8 products in a systematically rotated sequential monadic format.

Prior to tasting each product, respondents rated the product on appearance and aroma attributes.

Respondents were then instructed to take 2 to 3 bites of the turkey slices using a knife and fork.

After tasting each product, respondents evaluated the turkey on the following measures:

- | | | | |
|---|----------------|---|--------------|
| ✓ | Overall Liking | ✓ | Taste/Flavor |
| ✓ | Texture | ✓ | Imagery |

Respondents waited a minimum of 5 minutes between product evaluations to allow their mouths to return to a normal state of sensory acuity.

- Respondents cleansed their palate with a bite of cracker and a sip of water between product evaluations.

After completing the last taste evaluation, respondents completed the classification questionnaire.

SEQUENCE OF ACTIVITIES

- continued -

Visual Evaluation - Blind

At the end of the taste evaluation, respondents were divided into groups of 4 - 5.

The first group of respondents was directed to the tables with 8 whole chunks of deli turkey breast labeled with the appropriate product number. Each breast was presented unwrapped with an open face towards respondents.

- The order of the turkey breasts was randomized and was reordered in between each group of respondents to eliminate order bias.

Respondents were handed a booklet of questionnaires: one for each product with a overall liking ranking question at the end. The questionnaires were labeled with the product numbers and were in the order of the product rotation.

- Respondents evaluated each turkey breast on inner and outer appearance attributes.

Once all products were evaluated, respondents completed the ranking question: respondents were asked to rank the turkey breasts in order of liking from product liked most to product liked least.

- As each group completed the blind visual evaluation they were guided through a second visual evaluation which was branded.

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SEQUENCE OF ACTIVITIES

- continued -

Visual Evaluation - Branded

- After completing the visual blind phase of the study, respondents remained in their groups and were guided into another room to view all 8 chunks of deli turkey breasts branded.
- As with the blind phase, the order of the turkey breasts was randomized and was reordered in between each group of respondents to eliminate order bias.

Respondents were handed another booklet of questionnaires: one for each product with a overall liking ranking question at the end. The questionnaires were labeled with the brand name and were in the order of the product rotation.

Respondents evaluated each turkey breast on inner and outer appearance attributes.

Once all products were evaluated, respondents completed the ranking question: respondents were asked to rank the turkey breasts in order of liking from product liked most to product liked least.

As each group completed the branded visual evaluation they were thanked, paid and dismissed and second group began the branded evaluation.

PRODUCT DESCRIPTIONS

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PRODUCT DESCRIPTIONS

	PRODUCT ATTRIBUTES							
	<u>Longmont</u>	<u>Butterball Browned</u>	<u>Boar's Head</u>	<u>Sara Lee</u>	<u>Alpine Lace</u>	<u>Butterball O/R</u>	<u>Healthy Choice O/R</u>	<u>Dietz & Watson</u>
SKIN								
Skin on				X				
Skinless	X	X	X		X	X	X	X
NETTED APPEARANCE								
Netted	X							
Not Netted		X	X	X	X	X	X	X
SHAPE								
Round		X		X		X	X	
Pan	X		X		X			X
OUTER COLOR								
Brown/Roasted	X	X	X	X	X			X
White				X	X	X	X	
FAT								
Free	n/a			n/a	X	X	X	
Some	n/a	99	LOW	n/a				98
BINDERS								
Food Starch						X		
Carrageenan					X		X	
None	X	X	X	X				X

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QUESTIONNAIRES

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SCREENING QUESTIONNAIRE

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PTO-002553

**SCREENING QUESTIONNAIRE
- RANDOM SAMPLE -**

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PTO-002554

ID# _____

SCREENING QUESTIONNAIRE FOR DELI TURKEY STUDY
- RANDOM SAMPLE -

NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

TELEPHONE () _____ INTERVIEWER _____ DATE _____

() _____

Hello, I'm _____ from _____, a local market research interviewing company. We are conducting a survey in your area, and I would like to ask you a few questions.

INITIAL REFUSAL

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

1. ASK TO SPEAK WITH THE HEAD OF THE HOUSEHOLD. IF NOT AVAILABLE, TERMINATE AND TALLY.

NO HEAD OF HOUSEHOLD AVAILABLE

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

2. Record GENDER below.

Male ()

Female ()

- CHECK QUOTA (20% MALE, 80% FEMALE)

OVER QUOTA MALE

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

OVER QUOTA FEMALE

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

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PTO-002555

3. Which of the following best describes your age? (READ LIST.)

Under 21..... () --TERMINATE AND TALLY

21-24..... ()
25-29..... ()
30-34..... ()
35-39..... ()

- 50% QUOTA

40-44..... ()
45-49..... ()
50-54..... ()

- 50% QUOTA

55 or over..... () --TERMINATE AND TALLY

INTERVIEWER: CHECK QUOTAS.

UNDER 21/55 OR OVER

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

4. Do you, anyone else in your household, or any of your close friends, work for any of the following types of companies? (READ LIST.)

	YES	NO
Advertising Agency.....	()	()
Public Relations Firm.....	()	()
Market Research Company or Department.....	()	()
Marketing Company or Department.....	()	()
Manufacturer or Distributor or Wholesaler of Food Products.....	()	()

INTERVIEWER: IF "YES" [BOXED ANSWER] TO ANY OF THE ABOVE, TERMINATE AND TALLY.

SECURITY

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

5. When was the last time that you participated in any food related market research studies? (READ LIST.)

Within the past 6 months () -- TERMINATE AND TALLY

Longer than 6 months ago..... ()
Never..... () -- CONTINUE

PAST PARTICIPATION

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

6. Which of the following products have you, yourself, purchased and eaten in the PAST 3 MONTHS? (READ LIST.)

Presliced, Prepackaged Bacon..... ()

Deli Meats Sliced to order from the Deli
Counter..... () -- MUST MENTION TO CONTINUE

Prepackaged Lunch Meats..... ()

Cheese Sliced to order from the Deli Counter..... ()

None of these..... ()

INTERVIEWER: IF "DELI MEATS SLICED TO ORDER FROM THE DELI COUNTER" [BOXED ANSWER] NOT MENTIONED, TERMINATE AND TALLY.

DELI MEATS SLICED TO ORDER FROM DELI COUNTER NOT PURCHASED AND EATEN IN PAST 3 MONTHS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

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CRPF05015

PTO-002556

7. You mentioned that you have purchased and eaten "DELI MEATS SLICED TO ORDER FROM THE DELI COUNTER" in the PAST 3 MONTHS. Which of the following TYPES of DELI MEATS have you PURCHASED and EATEN in the PAST 3 MONTHS? (READ LIST.)

Ham ()
Roast Beef ()

Turkey Breast () - MUST MENTION TO CONTINUE

INTERVIEWER: IF "TURKEY BREAST" [BOXED ANSWER] IS NOT MENTIONED,
TERMINATE AND TALLY.

DID NOT MENTION TURKEY BREAST

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

8. Which of the following BRANDS of TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER have you, yourself, PURCHASED and EATEN in the PAST 3 MONTHS? (READ LIST.)

Alpine Lace ()
Bil Mar ()
Boar's Head ()

Butterball ()

Dietz and Watson ()
Healthy Choice ()
Louis Rich ()
Mr. Turkey ()
Sara Lee ()
Other ()

INTERVIEWER: KEEP TALLY OF BUTTERBALL USERS.

9. Do you keep a KOSHER HOUSEHOLD?

Yes () - TERMINATE AND TALLY

No () - CONTINUE

KEEPS KOSHER HOUSEHOLD

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

10. Are you on a strict medical diet (i.e. low cholesterol, low fat, low salt/sodium, low calorie, low sugar, etc.) that is doctor imposed and calls for the total elimination of a particular food?

Yes () - TERMINATE AND TALLY

No () - CONTINUE

RESPONDENT ON A STRICT MEDICAL DIET

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

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CRPF05016

PTO-002557

MOSKOWITZ JACOBS INC.
1025 WESTCHESTER AVE.
WHITE PLAINS, NY 10604

PROJECT #SW169-04.P97
SEPTEMBER, 1997
FINAL, PAGE 4

11. The reason that I have been asking you these questions is that we will be conducting a taste test of DELI TURKEY BREAST on (DAY/DATE) from (TIMES) at (LOCATION), and we would like you to participate.

The study will require approximately 2 hours of your time (day/date). If you agree to participate, we will give you \$_____ to show our appreciation.

Would you be interested in participating in this study?

Yes..... () - GIVE RESPONDENT DIRECTIONS TO TEST SITE. REMIND THEM OF THE DAY/DATE, TIME AND LOCATION.

No..... () - TERMINATE AND TALLY

QUALIFIED REFUSAL

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

As I've said, the test will be on (DAY/DATE). It will be held at (LOCATION). The session will begin promptly at (TIMES), so please be there at least 15 minutes early.

IF YOU WEAR READING OR COMPUTER GLASSES, PLEASE BE SURE TO BRING THEM.

ALSO, PLEASE BE SURE TO BRING SOME KIND OF IDENTIFICATION.

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Attorneys Only**

CRPF05017

PTO-002558

**SCREENING QUESTIONNAIRE
- AUGMENT SAMPLE -**

**CONFIDENTIAL -
Attorneys Only**

CRPF05018

PTO-002559

ID# _____

SCREENING QUESTIONNAIRE FOR DELI TURKEY STUDY
- AUGMENT SAMPLE -

NAME _____

ADDRESS _____

CITY _____ STATE _____ ZIP _____

TELEPHONE () _____ INTERVIEWER _____ DATE _____

() _____

Hello, I'm _____ from _____, a local market research interviewing company. We are conducting a survey in your area, and I would like to ask you a few questions.

INITIAL REFUSAL

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

1. ASK TO SPEAK WITH THE HEAD OF THE HOUSEHOLD. IF NOT AVAILABLE, TERMINATE AND TALLY.

NO HEAD OF HOUSEHOLD AVAILABLE

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

2. Record GENDER below.

Male ()

Female ()

- CHECK QUOTA (20% MALE, 80% FEMALE)

OVER QUOTA MALE

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

OVER QUOTA FEMALE

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

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CRPF05019

PTO-002560

3. Which of the following best describes your age? (READ LIST.)

Under 21..... () -TERMINATE AND TALLY

21-24..... ()
25-29..... ()
30-34..... ()
35-39..... ()
40-44..... ()
45-49..... ()
50-54..... ()

- CONTINUE

55 or over..... () -TERMINATE AND TALLY

INTERVIEWER: OBTAIN AN EVEN SPREAD OF AGES.

UNDER 21/55 OR OVER

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

4. Do you, anyone else in your household, or any of your close friends, work for any of the following types of companies? (READ LIST.)

	YES	NO
Advertising Agency.....	()	()
Public Relations Firm.....	()	()
Market Research Company or Department.....	()	()
Marketing Company or Department.....	()	()
Manufacturer or Distributor or Wholesaler of Food Products.....	()	()

INTERVIEWER: IF "YES" [BOXED ANSWER] TO ANY OF THE ABOVE, TERMINATE AND TALLY.

SECURITY

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

5. When was the last time that you participated in any food related market research studies? (READ LIST.)

Within the past 6 months..... () - TERMINATE AND TALLY

Longer than 6 months ago..... ()
Never..... () - CONTINUE

PAST PARTICIPATION

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

6. Which of the following products have you, yourself, purchased and eaten in the PAST 3 MONTHS? (READ LIST.)

Pre-sliced, Prepackaged Bacon..... ()

Deli Meats Sliced to order from the Deli
Counter..... () - MUST MENTION TO CONTINUE

Prepackaged Lunch Meats..... ()

Cheese Sliced to order from the Deli Counter..... ()

None of these..... ()

INTERVIEWER: IF "DELI MEATS SLICED TO ORDER FROM THE DELI COUNTER" [BOXED ANSWER] NOT MENTIONED, TERMINATE AND TALLY.

DELI MEATS SLICED TO ORDER FROM DELI COUNTER NOT PURCHASED AND EATEN IN PAST 3 MONTHS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

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CRPF05020

PTO-002561

7. You mentioned that you have purchased and eaten "DELI MEATS SLICED TO ORDER FROM THE DELI COUNTER" in the PAST 3 MONTHS. Which of the following TYPES of DELI MEATS have you PURCHASED and EATEN in the PAST 3 MONTHS? (READ LIST.)

Ham ()
Roast Beef ()

Turkey Breast () - MUST MENTION TO CONTINUE

INTERVIEWER: IF "TURKEY BREAST" [BOXED ANSWER] IS NOT MENTIONED,
TERMINATE AND TALLY.

DID NOT MENTION TURKEY BREAST

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

8. Which of the following BRANDS of TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER have you, yourself, PURCHASED and EATEN in the PAST 3 MONTHS? (READ LIST.)

Alpine Lace ()
Bill Mar ()
Boar's Head ()

Butterball () - MUST MENTION TO CONTINUE

Dietz and Watson ()
Healthy Choice ()
Louis Rich ()
Mr. Turkey ()
Sara Lee ()
Other ()

INTERVIEWER: MUST MENTION "BUTTERBALL" [BOXED ANSWER] TO CONTINUE. IF NOT,
TERMINATE AND TALLY.

BUTTERBALL NOT PURCHASED AND EATEN IN PAST 3 MONTHS

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

9. Do you keep a KOSHER HOUSEHOLD?

Yes () - TERMINATE AND TALLY

No () - CONTINUE

KEEPS KOSHER HOUSEHOLD

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

10. Are you on a strict medical diet (i.e. low cholesterol, low fat, low salt/sodium, low calorie, low sugar, etc.) that is doctor imposed and calls for the total elimination of a particular food?

Yes () - TERMINATE AND TALLY

No () - CONTINUE

RESPONDENT ON A STRICT MEDICAL DIET

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

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CRPF05021

PTO-002562

MOSKOWITZ JACOBS INC.
1025 WESTCHESTER AVE.
WHITE PLAINS, NY 10604

PROJECT #SW169-04.P97
SEPTEMBER, 1997
FINAL PAGE 4

11. The reason that I have been asking you these questions is that we will be conducting a taste test of DELI TURKEY BREAST on (DAY/DATE) from (TIMES) at (LOCATION), and we would like you to participate.

The study will require approximately 2 hours of your time (day/date). If you agree to participate, we will give you \$_____ to show our appreciation.

Would you be interested in participating in this study?

Yes..... () - GIVE RESPONDENT DIRECTIONS TO TEST SITE. REMIND THEM OF THE DAY/DATE, TIME AND LOCATION.

No..... () - TERMINATE AND TALLY

QUALIFIED REFUSAL

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48

As I've said, the test will be on (DAY/DATE). It will be held at (LOCATION). The session will begin promptly at (TIMES), so please be there at least 15 minutes early.

IF YOU WEAR READING OR COMPUTER GLASSES, PLEASE BE SURE TO BRING THEM.

ALSO, PLEASE BE SURE TO BRING SOME KIND OF IDENTIFICATION.

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CRPF05022

PTO-002563

**PRODUCT QUESTIONNAIRE
- TASTE EVALUATION -**

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CRPF05023

PTO-002564

**MAIN QUESTIONNAIRE
- DELI TURKEY -**

1Q Please LOOK at the TURKEY BREAST, but do not SMELL or TASTE it yet. Answer the following questions based on the APPEARANCE of the TURKEY BREAST.

1Q How much do you LIKE the OVERALL APPEARANCE of the TURKEY BREAST?
(00=hate, 100=love)

2Q How much do you LIKE the COLOR of the TURKEY BREAST?
(00=hate, 100=love)

3Q How LIGHT vs. DARK is the COLOR of the TURKEY BREAST?
(00=very light, 100=very dark)

4Q How do you FEEL about the COLOR of the TURKEY BREAST?
(00=too light, 50=just right, 100=too dark)

5Q How DRY vs. JUICY is the APPEARANCE of the TURKEY BREAST?
(00=very dry, 100=very juicy)

6Q How PROCESSED vs. NATURAL is the APPEARANCE of the TURKEY BREAST?
(00=very processed, 100=very natural)

7Q Please SMELL the TURKEY BREAST but do NOT TASTE it yet. Please answer the following questions about the AROMA of the TURKEY BREAST.

7Q How much do you LIKE the OVERALL AROMA of the TURKEY BREAST?
(00=hate, 100=love)

8Q How STRONG is the AROMA of the TURKEY BREAST?
(00=very weak, 100=very strong)

9Q Please take a bite of cracker and 2 to 3 sips of water. Now, using a fork and knife take at least 2 bites of the TURKEY BREAST and answer the following questions.

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CRPF05024

PTO-002565

**MAIN QUESTIONNAIRE
- DELI TURKEY -**

9Q Based on APPEARANCE, AROMA, TASTE and TEXTURE, how much do you LIKE the TURKEY BREAST OVERALL?
(00=hate, 100=love)

10Q How much do you LIKE the TASTE/FLAVOR of the TURKEY BREAST OVERALL?
(00=hate, 100=love)

11Q How STRONG is the TASTE/FLAVOR of the TURKEY BREAST?
(00=very weak, 100=very strong)

12Q How do you FEEL about the STRENGTH of TASTE/FLAVOR of the TURKEY BREAST?
(00=too weak, 50=just right, 100=too strong)

13Q How SALTY is the TURKEY BREAST?
(00=not at all salty, 100=very salty)

14Q How do you FEEL about the SALTINESS of the TURKEY BREAST?
(00=not salty enough, 50=just right, 100=too salty)

15Q How much do you LIKE the AFTERTASTE of the TURKEY BREAST OVERALL?
(00=hate, 100=love)

16Q How STRONG is the AFTERTASTE of the TURKEY BREAST?
(00=very weak, 100=very strong)

17Q How FRESH TASTING is the TURKEY BREAST?
(00=not at all fresh tasting, 100=very fresh tasting)

18Q How PROCESSED vs. NATURAL TASTING is the TURKEY BREAST?
(00=very processed tasting, 100=very natural tasting)

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Attorneys Only**

CRPF05025

PTO-002566

**MAIN QUESTIONNAIRE
- DELI TURKEY -**

19Q How much do you LIKE the OVERALL TEXTURE of the TURKEY BREAST?
(00=hate, 100=love)

20Q How DRY vs. JUICY is the TURKEY BREAST?
(00=very dry, 100=very juicy)

21Q How TOUGH vs. TENDER is the TURKEY BREAST?
(00=very tough, 100=very tender)

22Q How CHEWY is the TURKEY BREAST?
(00=not at all chewy, 100=very chewy)

23Q How FATTY vs. LEAN is the TURKEY BREAST?
(00=very fatty, 100=very lean)

24Q How WET, if at all, is the SURFACE of the TURKEY BREAST?
(00=not at all wet, 100=very wet)

25Q How well does the phrase "YOU WOULD THINK IT WAS SLICED RIGHT FROM A
HOMEMADE TURKEY" describe this TURKEY BREAST?
(00=does not describe at all, 100=describes completely)

26Q How would you DESCRIBE the QUALITY of the TURKEY BREAST?
(00=very low quality, 100=very high quality)

27Q How LIKELY would you be to PURCHASE the TURKEY BREAST?

- 1 Definitely would buy
- 2 Probably would buy
- 3 Might or might not buy
- 4 Probably would not buy
- 5 Definitely would not buy

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Attorneys Only**

CRPF05026

PTO-002567

**MAIN QUESTIONNAIRE
- DELI TURKEY -**

**DELI TURKEY BREAST MAIN QUESTIONNAIRE - FINAL
- SW169-04.P97 -**

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Attorneys Only**

CRPF05027

PTO-002568

**PRODUCT QUESTIONNAIRE
- VISUAL EVALUATION -**

**CONFIDENTIAL -
Attorneys Only**

CRPF05028

PTO-002569

**PRODUCT QUESTIONNAIRE
- BLIND VISUAL EVALUATION -**

**CONFIDENTIAL -
Attorneys Only**

CRPF05029

PTO-002570

APPEARANCE QUESTIONNAIRE

RESPONDENT ID #

«ID»

Please go up to the VISUAL TABLE. LOOK at the appropriate product number according to the number on the top of your questionnaire. LOOK at the product carefully.

PLEASE DO NOT TOUCH THE PRODUCT.

Answer the following questions looking at the TURKEY BREAST that corresponds to the number at the top of your questionnaire. Please write your answers in the box to the right of the question.

When you have answered all of the questions, notify the moderator for further instructions.

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CRPF05030

PTO-002571

APPEARANCE QUESTIONNAIRE

LOOK AT PRODUCT NUMBER

«ONE»

1Q	How much do you LIKE the APPEARANCE of the TURKEY BREAST OVERALL? (00=hate, 100=love)	<input type="text"/>
2Q	How much do you LIKE the APPEARANCE of the OUTSIDE of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
3Q	How much do you LIKE the OUTER COLOR of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
4Q	How LIGHT vs. DARK is the OUTER COLOR of the TURKEY BREAST? (00=very light, 100=very dark)	<input type="text"/>
5Q	How much do you LIKE the APPEARANCE of the INSIDE of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
6Q	How much do you LIKE the INNER COLOR of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
7Q	How LIGHT vs. DARK is the INNER COLOR of the TURKEY BREAST? (00=very light, 100=very dark)	<input type="text"/>
8Q	How VISIBLE is the GRAIN of the MEAT of the TURKEY BREAST? (00=not at visible, 100=very visible)	<input type="text"/>
9Q	How much do you LIKE the SHAPE of the TURKEY BREAST OVERALL ? (00=hate, 100=love)	<input type="text"/>
10Q	How PROCESSED vs. NATURAL is the SHAPE of the TURKEY BREAST OVERALL? (00=very processed, 100=very natural)	<input type="text"/>
11Q	How SIMILAR in APPEARANCE to a HOMEMADE TURKEY is this TURKEY BREAST? (00=not at all similar, 100=very similar)	<input type="text"/>

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CRPF05031

PTO-002572

APPEARANCE QUESTIONNAIRE

Please think about all of the products on the tables you just looked at and rank the products in order of liking. The product you like the MOST should be ranked 1st and the product you like the LEAST should be ranked 8th. Use each product number ONLY ONCE.

As you choose each product number, please cross it off from the list below:

501 502 503 504 505 506 507 508

	PRODUCT NUMBER
Product Like Most	— — —
Product Like Second	— — —
Product Like Third	— — —
Product Like Fourth	— — —
Product Like Fifth	— — —
Product Like Sixth	— — —
Product Like Seventh	— — —
Product Like Least	— — —

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CRPF05032

PTO-002573

**PRODUCT QUESTIONNAIRE
- BRANDED VISUAL EVALUATION -**

**CONFIDENTIAL -
Attorneys Only**

CRPF05033

PTO-002574

APPEARANCE QUESTIONNAIRE

RESPONDENT ID #

«ID»

Please go up to the VISUAL TABLE. LOOK at the appropriate product according to the brand name on the top of your questionnaire. LOOK at the product carefully.

PLEASE DO NOT TOUCH THE PRODUCT.

Answer the following questions looking at the TURKEY BREAST that corresponds to the brand name at the top of your questionnaire. Please write your answers in the box to the right of the question.

When you have answered all of the questions, notify the moderator for further instructions.

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CRPF05034

PTO-002575

APPEARANCE QUESTIONNAIRE

LOOK AT

«ONE»

1Q	How much do you LIKE the APPEARANCE of the TURKEY BREAST OVERALL? (00=hate, 100=love)	<input type="text"/>
2Q	How much do you LIKE the APPEARANCE of the OUTSIDE of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
3Q	How much do you LIKE the OUTER COLOR of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
4Q	How LIGHT vs. DARK is the OUTER COLOR of the TURKEY BREAST? (00=very light, 100=very dark)	<input type="text"/>
5Q	How much do you LIKE the APPEARANCE of the INSIDE of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
6Q	How much do you LIKE the INNER COLOR of the TURKEY BREAST? (00=hate, 100=love)	<input type="text"/>
7Q	How LIGHT vs. DARK is the INNER COLOR of the TURKEY BREAST? (00=very light, 100=very dark)	<input type="text"/>
8Q	How VISIBLE is the GRAIN of the MEAT of the TURKEY BREAST? (00=not at visible, 100=very visible)	<input type="text"/>
9Q	How much do you LIKE the SHAPE of the TURKEY BREAST OVERALL? (00=hate, 100=love)	<input type="text"/>
10Q	How PROCESSED vs. NATURAL is the SHAPE of the TURKEY BREAST OVERALL? (00=very processed, 100=very natural)	<input type="text"/>
11Q	How SIMILAR in APPEARANCE to a HOMEMADE TURKEY is this TURKEY BREAST? (00=not at all similar, 100=very similar)	<input type="text"/>

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CRPF05035

PTO-002576

APPEARANCE QUESTIONNAIRE

Please think about all of the products on the tables you just looked at and rank the products in order of liking. The product you like the MOST should be ranked 1st and the product you like the LEAST should be ranked 8th. Use each brand name ONLY ONCE.

As you choose each brand name, please cross it off from the list below:

Longmont	Alpine Lace	Sara Lee	Dietz & Watson
Butterball A	Butterball B	Boar's Head	Healthy Choice

	BRAND NAME
Product Like Most	_____
Product Like Second	_____
Product Like Third	_____
Product Like Fourth	_____
Product Like Fifth	_____
Product Like Sixth	_____
Product Like Seventh	_____
Product Like Least	_____

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CRPF05036

PTO-002577

CLASSIFICATION QUESTIONNAIRE

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CRPF05037

PTO-002578

DELI TURKEY BREAST CLASSIFICATION QUESTIONNAIRE - FINAL
- SW169-04.P97 -

1Q How OFTEN do you PURCHASE TURKEY BREAST sliced to order from the deli counter?

- 1 More than once a week
- 2 Once a week
- 3 Once every 2-3 weeks
- 4 Once a month
- 5 Once every 2 months
- 6 Once every 3 months

2Q How OFTEN do you EAT TURKEY BREAST sliced to order from the deli counter?

- 1 More than 3 times a week
- 2 2 to 3 times a week
- 3 More than once a week
- 4 Once a week
- 5 2 to 3 times a month
- 6 Once a month
- 7 Once every 2 months
- 8 Once every 3 months

3Q What type of TURKEY BREAST sliced to order from the deli counter do you PURCHASE and EAT MOST OFTEN?

- 1 Oven roasted turkey breast
- 2 Smoked turkey breast
- 3 Honey roasted turkey breast
- 4 Flavored turkey breast (i.e. Italian, Cajun, Peppered)
- 5 Other

4Q Which ONE brand of TURKEY BREAST sliced to order from the deli counter do you PURCHASE and EAT MOST OFTEN?

- 1 Alpine Lace
- 2 Bil Mar
- 3 Boar's Head
- 4 Butterball
- 5 Carolina
- 6 Dietz and Watson
- 7 Healthy Choice
- 8 Louis Rich
- 9 Mr. Turkey
- 10 Sara Lee
- 11 Other

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PTO-002579

DELI TURKEY BREAST CLASSIFICATION QUESTIONNAIRE - FINAL
- SW169-04.P97 -

5Q Who in your HOUSEHOLD usually EATS TURKEY BREAST sliced to order from the deli counter?

- 1 Myself
- 2 Other adults age 18 and over
- 3 Children 13-17
- 4 Children 6-12
- 5 Children under 6

10Q What is your MARITAL STATUS?

- 1 Married
- 2 Single (never married)
- 3 Divorced
- 4 Widowed
- 5 Separated

11Q Including yourself, how many people LIVE IN YOUR HOUSEHOLD?

- 1 One (self only) @16
- 2 Two
- 3 Three
- 4 Four
- 5 Five
- 6 Six or more

12Q How many CHILDREN UNDER 18 YEARS of age live in your household?

- 1 None @ 16
- 2 One
- 3 Two
- 4 Three
- 5 Four
- 6 Five
- 7 Six or more

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PTO-002580

DELI TURKEY BREAST CLASSIFICATION QUESTIONNAIRE - FINAL
- SW169-04.P97 -

13Q How many CHILDREN 13-17 YEARS of age live in your household?

- 1 None
- 2 One
- 3 Two
- 4 Three
- 5 Four
- 6 Five
- 7 Six or more

14Q How many CHILDREN 6-12 YEARS of age live in your household?

- 1 None
- 2 One
- 3 Two
- 4 Three
- 5 Four
- 6 Five
- 7 Six or more

15Q How many CHILDREN UNDER 6 YEARS of age live in your household?

- 1 None
- 2 One
- 3 Two
- 4 Three
- 5 Four
- 6 Five
- 7 Six or more

16Q Which of the following best describes the TOTAL YEARLY INCOME of your household before taxes?

- 1 Under \$15,000
- 2 \$15,000-\$24,999
- 3 \$25,000-\$34,999
- 4 \$35,000-\$44,999
- 5 \$45,000-\$59,999
- 6 \$60,000 or more

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PTO-002581

DELI TURKEY BREAST CLASSIFICATION QUESTIONNAIRE - FINAL
- SW169-04.P97 -

17Q What is the HIGHEST LEVEL of formal EDUCATION you completed?

- 1 Completed high school or equivalent
- 2 Some college
- 3 Completed college
- 4 Attended or completed graduate school
- 5 Attended or completed technical school

18Q You have completed the study. Please notify your moderator!

Thank you for your participation!

18Q Please answer the following questions based on the respondent's screening questionnaire.

18Q Enter respondent's GENDER. (Screener #2)

- 1 Male
- 2 Female

19Q Enter respondent's AGE. (Screener #3)

- 1 21-24
- 2 25-29
- 3 30-34
- 4 35-39
- 5 40-44
- 6 45-49
- 7 50-54

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PTO-002582

DELI TURKEY BREAST CLASSIFICATION QUESTIONNAIRE - FINAL
- SW169-04.P97 -

20Q BRAND(S) of TURKEY BREAST sliced to order from the deli counter respondent has purchased and eaten in the PAST 3 MONTHS.
(Screener #8)

- 1 Alpine Lace
- 2 Bil Mar
- 3 Boar's Head
- 4 Butterball
- 5 Dietz and Watson
- 6 Healthy Choice
- 7 Louis Rich
- 8 Mr. Turkey
- 9 Sara Lee
- 10 Other

30Q Please enter the appropriate market.

- 1 New York
- 2 Atlanta
- 3 Chicago

31Q Please enter which group respondent was recruited for.

- 1 Random Sample
- 2 Augment Sample

32Q Please press "ENTER" to save the data

Thank you!!

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PTO-002583

PERFORMANCE TABLES
- TASTE EVALUATION -

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PTO-002584

**PERFORMANCE TABLE
- RANDOM SAMPLE -**

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CRPF05044

PTO-002585

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE
- RANKED BY OVERALL LIKING -**

	Longmont Oven Prepared Breast	Butterball Golden Brown	Oven Gold	Boar's Head	Premium	Sara Lee	Alpine Lace Fat Free	Healthy Choice Oven Roasted	Butterball Oven Roasted	Dietz & Watson Premium	Significant Difference at 95%	Significant Difference at 90%
OVERALL RATINGS	104	102	105	106	108	103	101	107	102	101	102	102
L/D Overall Liking	61	60	59	58	54	54	54	49	54	49	+	+
PI Purchase Interest (Top Two Box %)	52	44	51	45	41	39	38	31	39	31	+	+
											NA	NA
APPEARANCE ATTRIBUTES												
L/D Like Overall Appearance	66	50	60	40	67	52	56	53	52	53	+	+
L/D Like Color	66	53	63	38	70	54	63	53	54	53	+	+
SEN Light vs. Dark Color	57	58	46	43	43	36	33	53	36	53	+	+
SEN Dry vs. Juicy Appearance	52	54	51	63	42	85	80	55	85	55	+	+
DIR Feel about Light vs. Dark Color	8	14	4	-2	1	-5	-5	6	-5	6	NA	NA
IMG Processed vs. Natural Appearance	64	56	56	56	52	47	55	51	47	51	+	+
											+	+
AROMA ATTRIBUTES												
L/D Like Overall Aroma	67	56	59	56	63	47	52	54	47	54	+	+
SEN Strength of Aroma	54	56	60	57	56	61	59	55	61	55	+	+
											+	+
TASTE/FLAVOR ATTRIBUTES												
L/D Like Taste/Flavor	61	63	59	63	57	55	55	50	55	50	+	+
L/D Like Aftertaste	57	60	58	58	52	52	51	45	52	45	+	+
SEN Strength of Taste/Flavor	69	67	69	62	55	61	68	62	61	62	+	+
SEN Saltiness	51	46	38	45	32	37	47	38	37	38	+	+
SEN Strength of Aftertaste	54	52	56	54	48	50	61	54	50	54	+	+
DIR Feel about Strength of Taste/Flavor	7	7	6	4	-2	4	9	6	4	6	NA	NA
DIR Feel about Saltiness	7	4	-1	5	-10	-2	6	-3	-2	-3	NA	NA
IMG Fresh Tasting	68	66	61	67	59	63	61	54	63	54	+	+
IMG Processed vs. Natural Tasting	63	58	52	65	50	51	46	43	51	43	+	+

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PTO-002586

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE
- RANKED BY OVERALL LIKING -**

	Longmont Oven Prepared Breast	Butterball Golden Brown Oven	Boar's Head Oven Gold	Sara Lee Premium	Alpine Lace Fat Free	Healthy Choice Oven Roasted	Butterball Oven Roasted	Dietz & Watson Premium	Significant Difference at 95%	Significant Difference at 90%
	104	102	105	106	108	103	101	107		
	61	60	59	58	54	54	54	49		
	52	44	51	45	41	39	38	31		
	65	57	64	62	55	51	54	49		
	60	62	55	65	40	82	82	57		
	73	67	68	69	62	81	82	69		
	54	54	52	53	57	48	46	45		
	76	67	78	68	75	70	74	66		
	41	51	42	56	29	77	73	43		
	58	54	54	58	44	43	47	40		
	67	62	62	63	57	56	57	52		

OVERALL RATINGS

L/D Overall Liking
P1 Purchase Interest (Top Two Box %)

TEXTURE ATTRIBUTES

L/D Like Overall Texture

SEN Dry vs. Juicy
SEN Tough vs. Tender
SEN Chewiness
SEN Fatty vs. Lean
SEN Wetness

IMAGERY ATTRIBUTES

IMG You Would Think It Was Sliced Right
IMG From A Homemade Turkey
IMG Quality

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PTO-002587

PERFORMANCE TABLE
- BUTTERBALL USERS -

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PTO-002588

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG BUTTERBALL USERS
- RANKED BY OVERALL LIKING -**

	Longmont Oven	Boar's Head	Alpine Lace	Sara Lee	Butterball Golden Brown	Dietz & Watson Premium	Healthy Choice Oven Roasted	Butterball Oven Roasted	Significant Difference at 95%	Significant Difference at 90%
OVERALL RATINGS	104	105	108	106	102	107	103	101		
L/D Overall Liking	64	61	58	57	56	54	53	52	+/-10]	+/-8]
PI Purchase Interest (Top Two Box %)	55	55	41	42	44	39	41	33	NA	NA
APPEARANCE ATTRIBUTES										
L/D Like Overall Appearance	67	60	69	38	50	53	51	54	+/-9]	+/-8]
L/D Like Color	66	64	70	38	49	54	55	62	+/-9]	+/-8]
SEN Light vs. Dark Color	59	47	44	38	59	51	35	32	+/-8]	+/-6]
SEN Dry vs. Juicy Appearance	51	51	44	64	55	55	81	76	+/-8]	+/-7]
DIR Feel about Light vs. Dark Color	8	-1	-2	-8	11	4	-7	-8	NA	NA
IMG Processed vs. Natural Appearance	64	57	53	46	56	53	46	53	+/-10]	+/-8]
AROMA ATTRIBUTES										
L/D Like Overall Aroma	64	59	58	51	50	50	45	53	+/-10]	+/-8]
SEN Strength of Aroma	59	62	57	55	53	56	60	58	+/-9]	+/-8]
TASTE/FLAVOR ATTRIBUTES										
L/D Like Taste/Flavor	62	61	59	60	55	53	55	56	+/-10]	+/-8]
L/D Like Aftertaste	57	57	56	53	55	50	48	52	+/-10]	+/-8]
SEN Strength of Taste/Flavor	72	72	56	62	62	62	60	66	+/-8]	+/-7]
SEN Saltiness	49	40	32	47	44	41	38	51	+/-9]	+/-8]
SEN Strength of Aftertaste	61	57	52	55	53	58	52	59	+/-8]	+/-7]
DIR Feel about Strength of Taste/Flavor	9	8	-1	4	7	7	1	6	NA	NA
DIR Feel about Saltiness	6	-2	-6	6	2	0	-1	9	NA	NA
IMG Fresh Tasting	66	63	66	59	64	58	61	59	+/-10]	+/-9]
IMG Processed vs. Natural Tasting	59	57	54	54	58	47	50	46	+/-11]	+/-9]

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PTO-002589

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG BUTTERBALL USERS
- RANKED BY OVERALL LIKING -**

	Longmont Oven	Boar's Head	Alpine Lace	Sara Lee	Butterball Golden Brown	Dietz & Watson Premium	Healthy Choice Oven Roasted	Butterball Oven Roasted	Significant Difference at 95%	Significant Difference at 90%
	Prepared Breast	Oven Gold	Fat Free	Premium						
	104	105	108	106	102	107	103	101		
L/D	64	61	58	57	56	54	53	52		
PI	55	55	41	42	44	39	41	33	+/-10	+/-8
									NA	NA
	66	68	62	56	60	53	49	56	+/-10	+/-9
	62	60	44	67	63	59	80	80	+/-8	+/-7
SEN Dry vs. Juicy	76	71	66	68	70	70	78	82	+/-8	+/-7
SEN Tough vs. Tender	52	52	54	52	52	46	47	50	+/-10	+/-9
SEN Chewiness	75	77	76	64	66	69	66	69	+/-9	+/-8
SEN Fatty vs. Lean	44	43	34	59	54	50	80	77	+/-9	+/-7
SEN Wetness										
	57	56	49	50	53	44	42	47	+/-11	+/-9
IMG You Would Think It Was Sliced Right	66	65	61	54	62	54	58	57	+/-10	+/-9
IMG From A Homemade Turkey										
IMG Quality										

OVERALL RATINGS

L/D Overall Liking
PI Purchase Interest (Top Two Box %)

TEXTURE ATTRIBUTES

L/D Like Overall Texture

SEN Dry vs. Juicy
SEN Tough vs. Tender
SEN Chewiness
SEN Fatty vs. Lean
SEN Wetness

IMAGERY ATTRIBUTES

You Would Think It Was Sliced Right
IMG From A Homemade Turkey
IMG Quality

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PTO-002590

PERFORMANCE TABLE
- MOISTNESS/TENDERNESS SEEKERS -

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PTO-002591

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE MOISTNESS/TENDERNESS SEEKERS**

- RANKED BY OVERALL LIKING -

	Healthy Choice Oven Roasted	Butterball Oven Roasted	Sara Lee Premium	Butterball Golden Brown	Boar's Head Oven Gold	Longmont Oven Prepared Breast	Dietz & Watson Premium	Alpine Lace Fat Free	Significant Difference at 95% alpha	Significant Difference at 90% alpha
	103 (37)	101 (37)	106 (37)	102 (37)	105 (37)	104 (37)	107 (37)	108 (37)		
Judgments per Product -->										
OVERALL RATINGS										
L/D Overall Liking	67	66	63	60	54	52	51	43		
P/I Purchase Interest (Top Two Box %)	54	57	46	38	46	41	32	19	+/-12]	+/-10] NA
APPEARANCE ATTRIBUTES										
L/D Like Overall Appearance	53	64	41	44	52	62	51	68	+/-12]	+/-10]
L/D Like Color	58	69	38	51	57	59	53	73	+/-13]	+/-11]
SEN Light vs. Dark Color	35	34	42	60	51	61	56	48	+/-10]	+/-9]
SEN Dry vs. Juicy Appearance	85	82	64	50	50	48	52	44	+/-11]	+/-9]
DIR Feel about Light vs. Dark Color	-5	-2	-2	14	6	8	8	4	NA	NA
IMG Processed vs. Natural Appearance	54	68	57	50	53	55	46	52	+/-13]	+/-11]
AROMA ATTRIBUTES										
L/D Like Overall Aroma	54	60	53	47	54	61	50	61	+/-12]	+/-10]
SEN Strength of Aroma	58	58	55	55	58	53	53	54	+/-11]	+/-9]
TASTE/FLAVOR ATTRIBUTES										
L/D Like Taste/Flavor	68	66	68	63	54	54	52	46	+/-12]	+/-10]
L/D Like Aftertaste	61	60	58	58	55	47	45	43	+/-13]	+/-11]
SEN Strength of Taste/Flavor	58	67	61	65	68	68	62	52	+/-10]	+/-9]
SEN Saltiness	35	40	46	46	37	52	36	32	+/-12]	+/-10]
SEN Strength of Aftertaste	44	59	56	51	58	59	49	44	+/-11]	+/-9]
DIR Feel about Strength of Taste/Flavor	1	5	4	10	5	13	5	-3	NA	NA
DIR Feel about Saltiness	-3	0	5	2	-3	9	-6	-10	NA	NA
IMG Fresh Tasting	73	69	73	66	57	59	56	51	+/-13]	+/-11]
IMG Processed vs. Natural Tasting	66	60	66	54	47	55	45	43	+/-13]	+/-11]

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PTO-002592

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE MOISTNESS/TENDERNESS SEEKERS**
- RANKED BY OVERALL LIKING -

	Healthy Choice Oven Roasted	Butterball Oven Roasted	Sara Lee Premium	Brown Golden	Boar's Head Oven Gold	Longmont Oven Prepared Breast	Dietz & Watson Premium	Alpine Lace Fat Free	Significant Difference at 95%	Significant Difference at 90%
Judgments per Product -->	103 (37)	101 (37)	106 (37)	102 (37)	105 (37)	104 (37)	107 (37)	108 (37)		
OVERALL RATINGS										
L/D Overall Liking	67	66	63	60	54	52	51	43	[+/-12]	[+/-10]
PI Purchase Interest (Top Two Box %)	54	57	46	38	46	41	32	19	NA	NA
TEXTURE ATTRIBUTES										
L/D Like Overall Texture	67	66	68	57	59	57	50	49	[+/-13]	[+/-11]
SEN Dry vs. Juicy	82	83	68	60	50	56	57	37	[+/-11]	[+/-9]
SEN Tough vs. Tender	83	81	68	67	60	64	64	54	[+/-11]	[+/-9]
SEN Chewiness	43	44	48	50	47	52	43	54	[+/-13]	[+/-11]
SEN Fatty vs. Lean	75	77	68	64	78	68	65	72	[+/-11]	[+/-9]
SEN Wetness	73	72	54	49	41	40	45	30	[+/-13]	[+/-11]
IMAGERY ATTRIBUTES										
You Would Think It Was Sliced Right										
IMG From A Homemade Turkey	58	57	62	52	47	47	40	35	[+/-15]	[+/-12]
IMG Quality	69	67	68	59	56	58	53	46	[+/-12]	[+/-10]

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PTO-002593

PERFORMANCE TABLE
- DRIER/LESS TENDER SEEKERS -

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PTO-002594

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE DRIER/LESS TENDER SEEKERS**

- RANKED BY OVERALL LIKING -

	Longmont Oven Prepared Breast										Significant Difference	
	Alpine Lace Fat Free	Boar's Head Oven Gold	Butterball Golden Brown	Sara Lee Premium	Dietz & Watson Premium	Butterball Oven Roasted	Healthy Choice Oven Roasted	Significant Difference at 95%	Significant Difference at 90%			
Judgments per Product -->												
OVERALL RATINGS												
L/D Overall Liking	104 (34)	108 (34)	105 (34)	102 (34)	106 (34)	107 (34)	101 (34)	103 (34)				
P1 Purchase Interest (Top Two Box %)	71	66	64	60	53	47	40	40				
	65	65	56	50	44	29	18	24				
APPEARANCE ATTRIBUTES												
L/D Like Overall Appearance	71	65	68	56	39	55	48	51				
L/D Like Color	73	68	70	56	39	54	56	49				
SEN Light vs. Dark Color	52	38	40	56	44	50	33	37				
SEN Dry vs. Juicy Appearance	56	39	52	59	62	60	79	84				
DIR Feel about Light vs. Dark Color	8	-2	1	14	-1	5	-8	-4				
IMG Processed vs. Natural Appearance	73	51	60	63	54	56	41	40				
AROMA ATTRIBUTES												
L/D Like Overall Aroma	73	64	65	65	59	57	43	39				
SEN Strength of Aroma	56	58	62	57	59	58	59	64				
TASTE/FLAVOR ATTRIBUTES												
L/D Like Taste/Flavor	69	68	65	63	58	46	44	40				
L/D Like Aftertaste	67	63	62	63	57	44	41	43				
SEN Strength of Taste/Flavor	69	58	70	70	64	63	71	64				
SEN Saltness	49	32	40	46	44	41	56	39				
SEN Strength of Aftertaste	48	53	53	54	52	59	62	56				
DIR Feel about Strength of Taste/Flavor	0	0	7	4	4	8	13	7				
DIR Feel about Saltness	5	-9	1	5	4	1	12	-1				
IMG Fresh Tasting	78	68	66	66	60	52	53	51				
IMG Processed vs. Natural Tasting	71	58	56	62	62	41	32	34				

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**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE DRIER/LESS TENDER SEEKERS
- RANKED BY OVERALL LIKING -**

		Longmont		Alpine		Boar's Head		Butterball		Sara Lee		Dietz & Watson		Butterball		Healthy Choice		Significant Difference at 95%	Significant Difference at 90%
Prepared Breast		Oven	Fat Free	Lace	Oven	Gold	Head	Brown	Golden	Premium	Premium	Premium	Oven	Roasted	Roasted	Oven	Roasted		
		104 (34)	108 (34)	108 (34)	105 (34)	102 (34)	102 (34)	106 (34)	107 (34)	101 (34)	101 (34)	101 (34)	101 (34)	101 (34)	101 (34)	101 (34)	101 (34)		
		71	66	66	64	60	60	53	47	40	40	40	40	40	40	40	40	+/ - 14	+/ - 12
		65	65	65	56	50	50	44	29	18	18	18	18	18	18	18	18	NA	NA
		74	62	62	69	56	56	55	48	42	42	42	42	42	42	42	42	+/ - 14	+/ - 12
		65	43	43	60	64	64	62	56	81	81	81	81	81	81	81	81	+/ - 12	+/ - 10
		82	71	71	76	68	68	71	75	84	84	84	84	84	84	84	84	+/ - 12	+/ - 10
		56	60	60	57	58	58	57	48	49	49	49	49	49	49	49	49	+/ - 15	+/ - 13
		84	79	79	78	69	69	68	68	71	71	71	71	71	71	71	71	+/ - 13	+/ - 11
		43	28	28	43	53	53	60	40	74	74	74	74	74	74	74	74	+/ - 14	+/ - 11
		70	53	53	61	55	55	53	40	35	35	35	35	35	35	35	35	+/ - 15	+/ - 13
		77	70	70	68	66	66	57	50	47	47	47	47	47	47	47	47	+/ - 14	+/ - 11

Judgments per Product -->

OVERALL RATINGS

L/D	Overall Liking	
PI	Purchase Interest (Top Two Box %)	

TEXTURE ATTRIBUTES

L/D	Like Overall Texture	
SEN	Dry vs. Juicy	
SEN	Tough vs. Tender	
SEN	Chewiness	
SEN	Fatty vs. Lean	
SEN	Wetness	

IMAGERY ATTRIBUTES

IMG	You Would Think It Was Sliced Right	
IMG	From A Homemade Turkey	
IMG	Quality	

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“REPORT CARD” OF PRODUCT PERFORMANCE
- By Market -

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CRPF05056

PTO-002597

“REPORT CARD” OF PRODUCT PERFORMANCE (TURKEY SLICE)

- By Market -

Given the small base sizes it is difficult to draw conclusions regarding the response patterns between liking scores across markets.

Is it likely that a particular market evaluated sub-par product?

Analysis of the pattern in liking would suggest NO. Had a particular product been “off” or “bad” we would have expected to see some of the remaining products significantly up-rated which is not reflected in these scores.

	Overall Liking			
	New York (24)	Atlanta (24)	Chicago (23)	
Judgments per Product →				
Longmont Oven Prepared Breast	60	57	67	
Butterball Golden Brown	65	63	52	
Boar's Head Oven Gold	61	49	67	
Sara Lee Premium	50	67	58	
Alpine Lace Fat Free	52	51	59	
Healthy Choice Oven Roasted	57	53	52	
Butterball Oven Roasted	56	44	61	
Dietz & Watson	35	48	64	
Significant Difference at 95% Confidence Level	[+/-17]	[+/-16]	[+/-16]	
Significant Difference at 90% Confidence Level	[+/-14]	[+/-13]	[+/-14]	

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PERFORMANCE TABLE
- RANDOM SAMPLE NEW YORK -

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PTO-002599

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE - NEW YORK
- RANKED BY OVERALL LIKING -**

	Butterball Golden Brown	Boar's Head Oven Gold	Longmont Oven Prepared Breast	Healthy Choice Oven Roasted	Butterball Oven Roasted	Alpine Lace Fat Free	Sara Lee Premium	Dietz & Watson Premium		
	102 (24)	105 (24)	104 (24)	103 (24)	101 (24)	108 (24)	106 (24)	107 (24)		
Judgments per Product →										
OVERALL RATINGS										
L/D Overall Liking	65	61	60	57	56	52	50	35	+/-14]	+/-14]
PJ Purchase Interest (Top Two Box %)	58	50	58	42	38	38	38	17	+/-17]	NA
									NA	NA
APPEARANCE ATTRIBUTES										
L/D Like Overall Appearance	54	58	61	53	64	71	37	49	+/-17]	+/-14]
L/D Like Color	58	60	64	58	67	78	35	56	+/-17]	+/-14]
SEN Light vs. Dark Color	53	53	59	38	40	40	45	62	+/-14]	+/-11]
SEN Dry vs. Juicy Appearance	46	56	49	87	79	37	64	56	+/-15]	+/-13]
DIR Feel about Light vs. Dark Color	10	12	7	0	-2	2	-3	11	NA	NA
IMG Processed vs. Natural Appearance	53	60	57	54	56	54	50	46	+/-18]	+/-15]
AROMA ATTRIBUTES										
L/D Like Overall Aroma	59	52	63	55	55	58	57	49	+/-16]	+/-13]
SEN Strength of Aroma	59	56	52	62	54	52	54	57	+/-15]	+/-13]
TASTE/FLAVOR ATTRIBUTES										
L/D Like Taste/Flavor	70	63	63	58	58	55	59	37	+/-17]	+/-14]
L/D Like Aftertaste	64	63	61	56	54	48	54	32	+/-18]	+/-15]
SEN Strength of Taste/Flavor	73	67	67	62	71	59	68	69	+/-14]	+/-11]
SEN Saltness	45	35	57	37	47	33	47	41	+/-17]	+/-14]
SEN Strength of Aftertaste	55	50	53	50	64	45	54	56	+/-16]	+/-13]
DIR Feel about Strength of Taste/Flavor	9	3	12	4	12	0	9	13	NA	NA
DIR Feel about Saltness	2	-2	16	-2	9	-6	7	-1	NA	NA
IMG Fresh Tasting	69	58	69	65	69	54	66	38	+/-18]	+/-15]
IMG Processed vs. Natural Tasting	61	54	61	46	49	39	56	30	+/-19]	+/-16]

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**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE - NEW YORK
- RANKED BY OVERALL LIKING -**

	Butterball Golden Brown	Boar's Head Oven Gold	Longmont Oven Prepared Breast	Healthy Choice Oven Roasted	Butterball Oven Roasted	Alpine Lace Fat Free	Sara Lee Premium	Dietz & Walson Premium	Significant Difference	Significant Difference
	102 (24)	105 (24)	104 (24)	103 (24)	101 (24)	108 (24)	106 (24)	107 (24)	AL 95%	AL 90%
Judgments per Product -->										
OVERALL RATINGS										
L/D Overall Liking	65	61	60	57	56	52	50	35	+/-17	+/-14
PI Purchase Interest (Top Two Box %)	58	50	58	42	38	38	38	17	NA	NA
TEXTURE ATTRIBUTES										
L/D Like Overall Texture	61	59	65	48	58	45	58	33	+/-18	+/-15
SEN Dry vs. Juicy	61	53	66	85	83	37	67	52	+/-14	+/-11
SEN Tough vs. Tender	66	61	72	79	79	55	69	56	+/-15	+/-13
SEN Chewiness	50	62	52	47	48	58	55	42	+/-17	+/-14
SEN Fatty vs. Lean	71	76	75	72	78	78	69	60	+/-15	+/-12
SEN Wetness	38	42	37	67	60	23	49	38	+/-18	+/-15
IMAGERY ATTRIBUTES										
You Would Think It Was Sliced Right										
IMG From A Homemade Turkey	58	49	57	39	46	34	49	22	+/-20	+/-17
IMG Quality	69	62	66	59	60	50	61	39	+/-17	+/-14

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PERFORMANCE TABLE
- RANDOM SAMPLE ATLANTA -

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PTO-002602

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE - ATLANTA**

- RANKED BY OVERALL LIKING -

		Sara Lee Premium	Butterball Golden Brown	Longmont Oven Prepared Breast	Healthy Choice Oven Roasted	Alpine Lace Fat Free Oven Roasted	Boar's Head Gold	Dietz & Watson Premium	Butterball Oven Roasted	Significant Difference	Significant Difference
	Judgments per Product -->										
	OVERALL RATINGS										
L/D	Overall Liking	106 (24)	102 (24)	104 (24)	103 (24)	108 (24)	105 (24)	107 (24)	101 (24)	at 95%	at 90%
PI	Purchase Interest (Top Two Box %)	67	62	57	53	51	49	48	44	[+/-16]	[+/-14]
		46	42	38	33	33	42	29	29	NA	NA
	APPEARANCE ATTRIBUTES										
L/D	Like Overall Appearance	44	53	71	54	67	55	53	50	[+/-16]	[+/-13]
L/D	Like Color	41	53	69	51	68	59	51	49	[+/-16]	[+/-13]
SEN	Light vs. Dark Color	41	56	53	28	42	36	44	31	[+/-13]	[+/-11]
SEN	Dry vs. Juicy Appearance	65	58	55	83	43	43	47	76	[+/-13]	[+/-11]
DIR	Feel about Light vs. Dark Color	-5	12	6	-10	-1	1	-1	-11	NA	NA
IMG	Processed vs. Natural Appearance	62	61	66	50	49	48	43	48	[+/-17]	[+/-14]
	AROMA ATTRIBUTES										
L/D	Like Overall Aroma	50	56	64	42	64	54	51	43	[+/-15]	[+/-12]
SEN	Strength of Aroma	55	61	52	64	54	63	50	60	[+/-14]	[+/-12]
	TASTE/FLAVOR ATTRIBUTES										
L/D	Like Taste/Flavor	67	65	56	53	54	49	49	45	[+/-16]	[+/-14]
L/D	Like Aftertaste	58	65	50	53	55	53	50	44	[+/-16]	[+/-14]
SEN	Strength of Taste/Flavor	59	66	66	59	53	73	55	64	[+/-14]	[+/-12]
SEN	Saltiness	39	49	44	34	37	45	29	49	[+/-15]	[+/-13]
SEN	Strength of Aftertaste	53	49	52	46	52	64	54	55	[+/-15]	[+/-12]
DIR	Feel about Strength of Taste/Flavor	-4	5	2	2	-3	10	2	8	NA	NA
DIR	Feel about Saltiness	-1	3	0	-5	-13	-1	-8	-1	NA	NA
IMG	Fresh Tasting	68	71	63	62	54	57	59	53	[+/-16]	[+/-13]
IMG	Processed vs. Natural Tasting	71	63	58	53	52	43	46	39	[+/-16]	[+/-14]

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PTO-002603

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE - ATLANTA
- RANKED BY OVERALL LIKING -**

	Sara Lee Premium	Butterball Golden Brown	Longmont Oven Prepared Breast	Healthy Choice Roasted	Alpine Free Oven	Boar's Head Gold	Dietz & Watson Premium	Butterball Oven Roasted	Significant Difference	Significant Difference
	106 (24)	102 (24)	104 (24)	103 (24)	108 (24)	105 (24)	107 (24)	101 (24)	at 95%	at 90%
Judgments per Product -->										
OVERALL RATINGS										
L/D Overall Liking	67	62	57	53	51	49	48	44	+/-16	+/-14
P1 Purchase Interest (Top Two Box %)	46	42	38	33	33	42	29	29	NA	NA
TEXTURE ATTRIBUTES										
L/D Like Overall Texture	64	58	62	56	54	59	57	50	+/-16	+/-13
SEN Dry vs. Juicy	65	63	59	82	40	49	54	76	+/-13	+/-11
SEN Tough vs. Tender	70	71	73	84	57	62	80	83	+/-12	+/-10
SEN Chewiness	55	55	63	57	64	55	50	50	+/-17	+/-15
SEN Fatty vs. Lean	71	69	73	68	71	71	70	73	+/-14	+/-11
SEN Wetness	63	56	46	85	37	43	43	78	+/-13	+/-11
IMAGERY ATTRIBUTES										
You Would Think It Was Sliced Right										
IMG From A Homemade Turkey	66	58	51	51	43	47	46	42	+/-17	+/-14
IMG Quality	68	64	63	56	55	54	53	52	+/-16	+/-13

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PERFORMANCE TABLE
- RANDOM SAMPLE CHICAGO -

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PTO-002605

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE - CHICAGO**

- RANKED BY OVERALL LIKING -

	Longmont Oven Prepared Breast	Boar's Head Oven Gold	Dietz & Watson Premium	Butterball Oven Roasted	Alpine Lace Fat Free	Sara Lee Premium	Healthy Choice Oven Roasted	Butterball Golden Brown	Significant Difference at 95%	Significant Difference at 90%
	104 (23)	105 (23)	107 (23)	101 (23)	108 (23)	106 (23)	103 (23)	102 (23)		
L/D Overall Liking	67	67	64	61	59	58	52	52		
PI Purchase Interest (Top Two Box %)	61	61	48	48	52	52	43	30		
L/D Like Overall Appearance	66	67	57	55	62	39	49	43		
L/D Like Color	65	72	54	72	65	40	53	48		
SEN Light vs. Dark Color	59	47	53	30	48	43	42	65		
SEN Dry vs. Juicy Appearance	52	54	64	86	44	59	84	59		
DIR Feel about Light vs. Dark Color	11	-2	9	-2	2	4	-4	21		
IMG Processed vs. Natural Appearance	68	60	63	61	52	56	37	55		
L/D Like Overall Aroma	74	73	62	57	66	61	45	51		
SEN Strength of Aroma	59	61	60	63	62	62	56	48		
L/D Like Taste/Flavor	65	66	63	63	60	64	53	53		
L/D Like Aftertaste	60	60	53	55	54	61	49	51		
SEN Strength of Taste/Flavor	72	67	64	70	53	61	62	62		
SEN Saltiness	52	35	46	47	26	49	40	45		
SEN Strength of Aftertaste	56	54	51	62	48	56	54	52		
DIR Feel about Strength of Taste/Flavor	7	6	3	5	-2	8	5	7		
DIR Feel about Saltiness	4	-1	0	10	-9	9	1	5		
IMG Fresh Tasting	74	70	65	61	69	68	62	59		
IMG Processed vs. Natural Tasting	70	59	52	51	60	67	54	50		

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**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE - CHICAGO**

- RANKED BY OVERALL LIKING -

	Longmont Oven Prepared Breast	Boar's Head Oven Gold	Dietz & Watson Premium	Butterball Oven Roasted	Alpine Lace Fat Free	Sara Lee Premium	Healthy Choice Oven Roasted	Butterball Golden Brown	Significant Difference at 95%	Significant Difference at 90%
	104 (23)	105 (23)	107 (23)	101 (23)	108 (23)	106 (23)	103 (23)	102 (23)		
	67	67	64	61	59	58	52	52	+/-16]	+/-13]
	61	61	48	48	52	52	43	30	NA	NA
	68	74	57	55	66	62	49	51	+/-17]	+/-15]
	54	63	65	86	43	64	80	61	+/-14]	+/-12]
	74	80	71	86	74	69	81	65	+/-15]	+/-13]
	46	39	44	40	48	47	41	56	+/-18]	+/-16]
	79	87	70	73	77	64	69	60	+/-16]	+/-14]
	42	41	48	81	28	57	79	58	+/-17]	+/-14]
	67	67	53	53	56	58	40	45	+/-19]	+/-16]
	72	70	63	60	68	60	52	55	+/-17]	+/-14]

Judgments per Product -->

OVERALL RATINGS

L/D Overall Liking
PI Purchase Interest (Top Two Box %)

TEXTURE ATTRIBUTES

L/D Like Overall Texture

SEN Dry vs. Juicy
SEN Tough vs. Tender
SEN Chewiness
SEN Fatty vs. Lean
SEN Wetness

IMAGERY ATTRIBUTES

IMG You Would Think It Was Sliced Right
IMG From A Homemade Turkey
IMG Quality

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PTO-002607

PERFORMANCE TABLES
- VISUAL EVALUATION -

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PTO-002608

PERFORMANCE TABLE
- RANDOM SAMPLE -

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PTO-002609

**BLIND VISUAL PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE
- RANKED BY LIKING OF OVERALL APPEARANCE -**

		Judgments per Product -->											
		OVERALL RATING											
		L/D Like Appearance Overall											
		APPEARANCE ATTRIBUTES											
		L/D Like Appearance of Outside											
		L/D Like Outer Color											
		L/D Like Appearance of Inside											
		L/D Like Inside Color											
		L/D Like Shape Overall											
		SEN Light vs. Dark Outer Color											
		SEN Light vs. Dark Inner Color											
		SEN Visible Grain of Meat											
		IMG Processed vs. Natural Shape Overall											
		IMAGERY/MISCELLANEOUS ATTRIBUTES											
		IMG Similar Appearance to Homemade Turkey											
		MISC Overall Liking Rank (%)											
		Like Most											
		Like Second											
		Like Third											
		Like Fourth											
		Like Fifth											
		Like Sixth											
		Like Seventh											
		Like Least											
		Mean Score											
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Longmont Oven Prepared Breast		Butterball Golden Brown	Boar's Head Gold	Sara Lee Premium	Dietz & Watson Premium	Alpine Lace Fat Free	Butterball Oven Roasted	Healthy Choice Roasted	Significant Difference at 95%	Significant Difference at 90%
L/D		501 (71)	505 (71)	507 (71)	503 (71)	502 (71)	506 (71)	508 (71)		
	Like Appearance Overall	68	60	56	48	41	21	19	{+/-10}	{+/-8}
L/D		65	58	56	47	42	17	16	{+/-10}	{+/-8}
	Like Appearance of Outside									
L/D		67	59	57	42	41	15	16	{+/-10}	{+/-9}
	Like Outer Color									
L/D		68	57	62	48	53	34	25	{+/-9}	{+/-8}
	Like Appearance of Inside									
L/D		69	58	65	49	55	38	27	{+/-9}	{+/-7}
	Like Inside Color									
L/D		70	66	51	68	46	42	36	{+/-10}	{+/-8}
	Like Shape Overall									
SEN		77	76	50	33	68	6	9	{+/-7}	{+/-6}
	Light vs. Dark Outer Color									
SEN		48	52	41	38	47	20	22	{+/-8}	{+/-6}
	Light vs. Dark Inner Color									
SEN		65	71	59	63	62	51	47	{+/-9}	{+/-8}
	Visible Grain of Meat									
IMG		67	58	53	60	50	30	24	{+/-10}	{+/-9}
	Processed vs. Natural Shape Overall									
IMG		66	55	51	64	46	26	21	{+/-11}	{+/-9}
	Similar Appearance to Homemade Turkey									
MISC										
	Overall Liking Rank (%)									
	Like Most									
	Like Second								NA	NA
	Like Third								NA	NA
	Like Fourth								NA	NA
	Like Fifth								NA	NA
	Like Sixth								NA	NA
	Like Seventh								NA	NA
	Like Least								NA	NA
	Mean Score								NA	NA

**BRANDED VISUAL PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE
- RANKED BY LIKING OF OVERALL APPEARANCE -**

Judgments per Product -->																			
	Boar's Head	Longmont Oven	Butterball Golden	Sara Lee	Dietz & Watson	Alpine Lace	Butterball Oven	Healthy Choice	Significant Difference										
									Premium	Fat Free	Roasted	Oven Roasted							
OVERALL RATING										507 (71)	501 (71)	505 (71)	503 (71)	504 (71)	502 (71)	506 (71)	508 (71)	Significant Difference at 95%	Significant Difference at 90%
L/D		68	63	54	53	52	45	36	21										
APPEARANCE ATTRIBUTES																			
L/D		68	61	51	48	49	41	32	17										
L/D		64	62	51	48	50	47	30	17										
L/D		68	64	56	55	62	52	44	31										
L/D		69	65	53	53	63	57	46	35										
L/D		60	68	64	69	53	46	52	37										
SEN		58	78	62	38	70	59	26	9										
SEN		41	47	44	39	41	38	31	21										
SEN		59	57	60	65	55	51	55	51										
IMG		61	60	58	68	51	33	38	27										
IMAGERY ATTRIBUTES																			
IMG		60	57	54	66	48	33	35	27										
MISC																			

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PTO-002611

VISUAL EVALUATION OF THE DELI TURKEY BREAST
PRODUCTS
- By Market -

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PTO-002612

LIKING OF OVERALL APPEARANCE OF THE DELI TURKEY BREAST PRODUCTS - VISUAL EVALUATION
- RANKED BY RANDOM SAMPLE BLIND -

Product Number	Product Description	Random Sample		New York		Atlanta		Chicago	
		Blind (71)	Branded Difference (71)	Blind (24)	Branded Difference (24)	Blind (24)	Branded Difference (24)	Blind (23)	Branded Difference (23)
501	Longmont Oven Prepared Breast	68	63	56	-8	70	65	69	0
505	Butterball Golden Brown	60	54	63	+2	63	28	55	+16
507	Boar's Head Oven Gold	56	68	75	+16	51	63	60	+8
503	Sara Lee Premium	48	33	53	-2	32	48	59	0
504	Dietz & Watson Premium	48	52	45	+11	49	48	62	+3
502	Alpine Lace Fat Free	41	45	47	+1	28	36	51	+3
506	Butterball Oven Roasted	21	36	28	+8	15	48	29	+3
508	Healthy Choice Oven Roasted	19	21	20	-1	12	14	24	+6

Significant difference at the 95% confidence level +/-10] +/-17] +/-15] +/-16] +/-17] +/-18]

Significant difference at the 90% confidence level +/-8] +/-14] +/-15] +/-14] +/-14] +/-15]

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* = Not available in this market.

PERFORMANCE TABLE
- BUTTERBALL USERS -

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PTO-002614

**BLIND VISUAL PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG BUTTERBALL USERS
- RANKED BY LIKING OF OVERALL APPEARANCE -**

		Judgments per Product -->										Significant Difference		Significant Difference	
		<u>OVERALL RATING</u>													
		Like Appearance Overall													
		<u>APPEARANCE ATTRIBUTES</u>													
		Like Appearance of Outside													
		Like Outer Color													
		Like Appearance of Inside													
		Like Inside Color													
		Like Shape Overall													
		Light vs. Dark Outer Color													
		Light vs. Dark Inner Color													
		Visible Grain of Meat													
		Processed vs. Natural Shape Overall													
		<u>IMAGERY/MISCELLANEOUS ATTRIBUTES</u>													
		Similar Appearance to Homemade Turkey													
		Overall Liking Rank (%)													
		Like Most													
		Like Second													
		Like Third													
		Like Fourth													
		Like Fifth													
		Like Sixth													
		Like Seventh													
		Like Least													
		Mean Score													

**BRANDED VISUAL PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG BUTTERBALL USERS
- RANKED BY LIKING OF OVERALL APPEARANCE -**

	Judgments per Product -->										Significant Difference	Significant Difference
	Boar's Head	Longmont Oven	Butterball Golden Brown	Dietz & Watson Premium	Sara Lee Premium	Alpine Lace Fat Free	Butterball Oven Roasted	Healthy Choice Oven Roasted	508	508	at 95%	at 90%
OVERALL RATING												
L/D	507 (66)	501 (66)	505 (66)	504 (66)	503 (66)	502 (66)	506 (66)	508 (66)	508 (66)	508 (66)		
	66	65	59	56	54	53	34	19	19	19	+/-10	+/-9
APPEARANCE ATTRIBUTES												
L/D	68	63	56	54	53	48	30	18	18	18	+/-10	+/-9
L/D	67	63	59	55	51	52	27	17	17	17	+/-10	+/-9
L/D	68	64	59	63	54	57	42	29	29	29	+/-9	+/-8
L/D	69	64	56	64	51	61	44	35	35	35	+/-9	+/-7
L/D	62	69	67	56	66	49	47	31	31	31	+/-10	+/-8
SEN	58	77	67	72	43	62	25	12	12	12	+/-8	+/-7
SEN	42	50	49	44	40	41	31	20	20	20	+/-8	+/-7
SEN	60	59	63	54	62	50	57	48	48	48	+/-9	+/-8
IMG	65	61	59	56	69	39	38	23	23	23	+/-10	+/-8
IMAGERY/MISCELLANEOUS ATTRIBUTES												
IMG	61	61	58	53	67	36	36	23	23	23	+/-10	+/-9
MISC Overall Liking Rank (%)												
	29	26	22	3	9	5	6	0	0	0	NA	NA
Like Most	6	22	18	26	14	5	8	2	2	2	NA	NA
Like Second	23	22	14	17	8	14	3	0	0	0	NA	NA
Like Third	15	8	14	20	12	17	12	2	2	2	NA	NA
Like Fourth	14	12	9	17	8	23	9	8	8	8	NA	NA
Like Fifth	5	6	6	9	38	18	8	9	9	9	NA	NA
Like Sixth	3	5	11	6	6	3	32	34	34	34	NA	NA
Like Seventh	5	0	6	2	5	15	22	46	46	46	NA	NA
Like Least	33	30	36	38	46	49	57	71	71	71	NA	NA
Mean Score												

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PERFORMANCE TABLE
- MOISTNESS/TENDERNESS SEEKERS -

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**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG MOISTNESS/TENDERNESS SEEKERS
- WELL LIKED ASE PRODUCTS VS. KEY COMPETITORS -**

		Healthy Choice Oven Roasted	Butterball Oven Roasted	Sara Lee Premium	Bonr's Head Oven Gold	Significant Difference at 95%	Significant Difference at 90%
	Judgments per Product -->	103 (37)	101 (37)	106 (37)	105 (37)		
OVERALL RATINGS							
L/D	Overall Liking	67	66	63	54	[+/-12]	[+/-10]
PI	Purchase Interest (Top Two Box %)	54	57	46	46	NA	NA
APPEARANCE ATTRIBUTES							
L/D	Like Overall Appearance	53	64	41	52	[+/-12]	[+/-10]
L/D	Like Color	58	69	38	57	[+/-13]	[+/-11]
SEN	Light vs. Dark Color	35	34	42	51	[+/-10]	[+/-9]
SEN	Dry vs. Juicy Appearance	85	82	64	50	[+/-11]	[+/-9]
DIR	Feel about Light vs. Dark Color	-5	-2	-2	6	NA	NA
IMG	Processed vs. Natural Appearance	54	68	57	53	[+/-13]	[+/-11]
AROMA ATTRIBUTES							
L/D	Like Overall Aroma	54	60	53	54	[+/-12]	[+/-10]
SEN	Strength of Aroma	58	58	55	58	[+/-11]	[+/-9]
TASTE/FLAVOR ATTRIBUTES							
L/D	Like Taste/Flavor	68	66	68	54	[+/-12]	[+/-10]
L/D	Like Aftertaste	61	60	58	55	[+/-13]	[+/-11]
SEN	Strength of Taste/Flavor	58	67	61	68	[+/-10]	[+/-9]
SEN	Saltiness	35	40	46	37	[+/-12]	[+/-10]
SEN	Strength of Aftertaste	44	59	56	58	[+/-11]	[+/-9]
DIR	Feel about Strength of Taste/Flavor	1	5	4	5	NA	NA
DIR	Feel about Saltiness	-3	0	5	-3	NA	NA
IMG	Fresh Tasting	73	69	73	57	[+/-13]	[+/-11]
IMG	Processed vs. Natural Tasting	66	60	66	47	[+/-13]	[+/-11]

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PTO-002618

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG MOISTNESS/TENDERNESS SEEKERS
- WELL LIKED ASE PRODUCTS VS. KEY COMPETITORS -**

		Healthy Choice Oven Roasted	Butterball Oven Roasted	Sara Lee Premium	Boar's Head Oven Gold	Significant Difference at 95%	Significant Difference at 90%
Judgments per Product -->		103 (37)	101 (37)	106 (37)	105 (37)		
OVERALL RATINGS							
L/D	Overall Liking	67	66	63	54	+/-12]	+/-10]
PI	Purchase Interest (Top Two Box %)	54	57	46	46	NA	NA
TEXTURE ATTRIBUTES							
L/D	Like Overall Texture	67	66	68	59	+/-13]	+/-11]
SEN	Dry vs. Juicy	82	83	68	50	+/-11]	+/-9]
SEN	Tough vs. Tender	83	81	68	60	+/-11]	+/-9]
SEN	Chewiness	43	44	48	47	+/-13]	+/-11]
SEN	Fatty vs. Lean	75	77	68	78	+/-11]	+/-9]
SEN	Wetness	73	72	54	41	+/-13]	+/-11]
IMAGERY ATTRIBUTES							
You Would Think It Was Sliced							
IMG	Right From A Homemade Turkey	58	57	62	47	+/-15]	+/-12]
IMG	Quality	69	67	68	56	+/-12]	+/-10]

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**BLIND VISUAL PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE MOISTNESS/TENDERNESS SEEKERS
- RANKED BY LIKING OF OVERALL APPEARANCE -**

Longmont		Sara Lee	Boar's Head	Butterball Golden Brown	Dietz & Watson Premium Fat Free	Alpine Lace	Butterball Roasted Oven	Healthy Choice Roasted Oven	Significant Difference
Judgments per Product -->									
OVERALL RATING									
L/D	Like Appearance Overall	501 (37)	503 (37)	507 (37)	505 (37)	504 (37)	502 (37)	506 (37)	508 (37)
		63	56	53	53	41	41	25	20
									[+/-13]
									[+/-11]
APPEARANCE ATTRIBUTES									
L/D	Like Appearance of Outside								
L/D	Like Outer Color	57	53	52	50	36	41	20	17
L/D	Like Appearance of Inside	64	49	53	51	35	44	15	16
L/D	Like Inside Color	63	55	58	53	47	50	38	28
L/D	Like Shape Overall	63	57	62	55	50	50	44	30
L/D		65	73	49	65	42	43	42	37
									[+/-13]
SEN	Light vs. Dark Outer Color								
SEN	Light vs. Dark Inner Color	76	36	47	78	67	55	6	9
SEN	Visible Grain of Meat	52	37	43	51	49	40	19	23
		63	61	57	66	58	51	54	46
									[+/-13]
IMG	Processed vs. Natural Shape Overall	60	61	50	54	47	32	30	22
									[+/-14]
									[+/-12]
IMAGERY/MISCELLANEOUS ATTRIBUTES									
IMG	Similar Appearance to Homemade Turkey	58	64	49	50	42	25	33	23
									[+/-15]
MISC Overall Liking Rank (%)									
	Like Most								
	Like Second	27	30	22	19	0	3	0	0
	Like Third	27	5	22	16	16	5	8	0
	Like Fourth	3	16	14	19	22	19	3	5
	Like Fifth	16	3	16	22	22	8	5	8
	Like Sixth	16	19	16	3	14	24	5	3
	Like Seventh	5	19	3	11	8	27	16	11
	Like Least	3	5	5	5	8	3	41	30
	Mean Score	3	3	3	5	11	11	22	43
		3.1	3.7	3.3	3.5	4.4	4.9	6.3	6.8
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**BRANDED VISUAL PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE MOISTNESS/TENDERNESS SEEKERS
- RANKED BY LIKING OF OVERALL APPEARANCE -**

		Boar's Head		Sara Lee		Longmont Oven Prepared Breast		Dietz & Watson Premium		Butterball Golden Brown		Alpine Lace Fat Free		Butterball Roasted Oven		Healthy Choice		Significant Difference		Significant Difference	
		Oven Gold	Premium	Premium	Prepared Breast	Oven	Premium	Premium	Premium	Brown	Golden	Free	Free	Roasted	Oven	Roasted	Choice	at 1.95%	at 1.95%	at 1.95%	at 1.95%
		507 (37)	503 (37)	501 (37)	504 (37)	505 (37)	502 (37)	506 (37)	508 (37)												
Judgments per Product -->																					
OVERALL RATING																					
L/D	Like Appearance Overall	71	61	59	47	46	43	36	22												
APPEARANCE ATTRIBUTES																					
L/D	Like Appearance of Outside	72	56	55	45	44	38	32	18												
L/D	Like Outer Color	67	54	58	45	46	47	30	15												
L/D	Like Appearance of Inside	69	57	60	56	47	52	46	30												
L/D	Like Inside Color	68	54	60	58	47	55	49	34												
L/D	Like Shape Overall	63	71	64	53	60	43	50	36												
SEN	Light vs. Dark Outer Color	58	42	78	63	61	61	28	11												
SEN	Light vs. Dark Inner Color	43	44	49	39	45	42	32	24												
SEN	Visible Grain of Meat	55	64	54	52	58	49	54	44												
IMG	Processed vs. Natural Shape Overall	63	72	58	47	51	31	39	27												
IMAGERY ATTRIBUTES																					
IMG	Similar Appearance to Homemade Turkey	64	68	51	42	44	29	33	26												
MISC	Overall Liking Rank (%)																				
	Like Most	32	19	16	8	16	0	5	3												
	Like Second	8	22	19	14	24	3	11	0												
	Like Third	14	8	24	14	16	16	8	0												
	Like Fourth	24	5	11	24	11	8	8	8												
	Like Fifth	16	11	8	16	3	27	11	8												
	Like Sixth	0	32	11	8	14	16	14	5												
	Like Seventh	3	3	8	11	11	14	27	24												
	Like Least	3	0	3	5	5	16	16	51												
	Mean Score	3.1	3.8	3.5	4.2	3.7	5.4	5.4	6.9												

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PERFORMANCE TABLE
- DRIER/LESS TENDER SEEKERS -

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PTO-002622

**PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG DRIER/LESS TENDER SEEKERS**

- WELL LIKED ASE PRODUCTS VS. KEY COMPETITORS -

		Longmont		Alpine		Boar's		Sara		Significant Difference at 95%	Significant Difference at 90%
		Prepared Breast	Oven Breast	Fat Free	Lace	Oven Gold	Head	Premium	Lee		
Judgments per Product -->											
OVERALL RATINGS											
L/D	Overall Liking										
PI	Purchase Interest (Top Two Box %)										
		104 (34)	71	108 (34)	66	105 (34)	64	106 (34)	53	[+/-14]	[+/-12]
			65		65		56		44	NA	NA
APPEARANCE ATTRIBUTES											
L/D	Like Overall Appearance										
L/D	Like Color										
		71	71	65	65	68	39		39	[+/-14]	[+/-12]
		73	73	68			70		39	[+/-14]	[+/-12]
SEN	Light vs. Dark Color										
SEN	Dry vs. Juicy Appearance										
		52	52	38			40		44	[+/-12]	[+/-10]
		56	56	39			52		62	[+/-12]	[+/-10]
DIR	Feel about Light vs. Dark Color										
		8	8	-2			1		-1	NA	NA
IMG	Processed vs. Natural Appearance										
		[73]	[73]	51			60		54	[+/-15]	[+/-13]
AROMA ATTRIBUTES											
L/D	Like Overall Aroma										
		73	73	64			65		59	[+/-13]	[+/-11]
SEN	Strength of Aroma										
		56	56	58			62		59	[+/-13]	[+/-11]
TASTE/FLAVOR ATTRIBUTES											
L/D	Like Taste/Flavor										
L/D	Like Aftertaste										
		69	69	68			65		58	[+/-14]	[+/-12]
		67	67	63			62		57	[+/-14]	[+/-12]
SEN	Strength of Taste/Flavor										
SEN	Saltiness										
SEN	Strength of Aftertaste										
		69	69	58			70		64	[+/-12]	[+/-10]
		49	49	32			40		44	[+/-14]	[+/-11]
		48	48	53			53		52	[+/-13]	[+/-11]
DIR	Feel about Strength of Taste/Flavor										
DIR	Feel about Saltiness										
		0	0	0			7		4	NA	NA
		5	5	-9			1		4	NA	NA
IMG	Fresh Tasting										
IMG	Processed vs. Natural Tasting										
		[78] 71	[78] 71	68			66		60	[+/-15]	[+/-12]
				58			56		62	[+/-15]	[+/-13]

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WELL-LIKED ASE PRODUCTS VS. KEY COMPETITORS -

IMAGERY ATTRIBUTES

**You Would Think It Was Sliced
Right From A Homemade Turkey
IMG Quality**

PTO-002624

**BLIND VISUAL PERFORMANCE OF THE DELI TURKEY BREASTS
AMONG RANDOM SAMPLE DRIER/LESS TENDER SEEKERS
- RANKED BY LIKING OF OVERALL APPEARANCE -**

		Judgments per Product -->										Significant Difference at 95%		Significant Difference at 90%	
		<u>OVERALL RATING</u>													
Prepared Breast	Longmont Oven	Butterball Golden Brown	Boar's Head	Dietz & Watson Premium	Alpine Lace Free	Sara Lee Premium Oven Roasted	Healthy Choice Roasted	Butterball Oven Roasted							
	501 (34)	505 (34)	507 (34)	504 (34)	502 (34)	503 (34)	508 (34)	506 (34)							
<u>APPEARANCE ATTRIBUTES</u>															
L/D	Like Appearance Overall	73	67	59	55	42	40	18	17	{+/-14}	{+/-12}				
<u>IMAGERY/MISCELLANEOUS ATTRIBUTES</u>															
SEN	Light vs. Dark Outer Color														
SEN	Light vs. Dark Inner Color	79	74	52	70	61	31	9	7	{+/-10}	{+/-9}				
SEN	Visible Grain of Meat	45	53	38	44	41	38	21	22	{+/-12}	{+/-10}				
IMG	Processed vs. Natural Shape Overall	67	77	60	67	51	66	48	49	{+/-14}	{+/-12}				
		75	62	55	54	28	59	26	30	{+/-16}	{+/-13}				
IMG	Similar Appearance to Homemade Turkey	74	61	53	51	27	63	19	26	{+/-15}	{+/-13}				
<u>MISC Overall Liking Rank (%)</u>															
	Like Most	26	24	18	12	12	6	0	3	NA	NA				
	Like Second	32	29	15	9	12	3	0	0	NA	NA				
	Like Third	29	24	26	15	3	0	0	3	NA	NA				
	Like Fourth	6	6	12	38	15	18	0	6	NA	NA				
	Like Fifth	3	12	6	9	24	26	12	9	NA	NA				
	Like Sixth	3	0	15	12	18	26	6	21	NA	NA				
	Like Seventh	0	6	3	6	0	15	24	47	NA	NA				
	Like Least	0	0	6	0	18	6	59	12	NA	NA				
	Mean Score	2.4	2.8	3.6	3.8	4.7	5.2	7.3	6.3	NA	NA				

-RANKED BY LIKING OF OVERALL APPEARANCE-

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PTO-002626

KEY DEMOGRAPHIC & USAGE DATA
- RANDOM SAMPLE AND BUTTERBALL USERS -

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PTO-002627

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

	BASE SIZE →	Random Sample (71) %	Butterball Users (66) %
<u>MARKET</u>			
New York		34	26
Atlanta		34	30
Chicago		32	44
<u>GENDER</u>			
Male		21	18
Female		79	82
<u>AGE</u>			
21-24		7	3
25-29		7	11
30-34		13	11
35-39		18	21
40-44		24	27
45-49		18	14
50-54		13	14
<u>MARITAL STATUS</u>			
Married		68	71
Single (never married)		20	12
Divorced		10	12
Widowed		0	2
Separated		3	3
<u>HIGHEST LEVEL OF EDUCATION COMPLETED</u>			
Completed high school or equivalent		24	18
Some college		42	45
Completed college		23	24
Attended or completed graduate school		10	9
Attended or completed technical school		1	3
<u>HOUSEHOLD TOTAL YEARLY INCOME BEFORE TAXES</u>			
Under \$15,000		3	2
\$15,000-\$24,999		6	8
\$25,000-\$34,999		14	14
\$35,000-\$44,999		25	21
\$45,000-\$59,999		18	20
\$60,000 or more		34	36

PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

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PTO-002628

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

	BASE SIZE →	Random Sample (71) %	Butterball Users (66) %
<u>NUMBER OF PEOPLE IN HOUSEHOLD</u>			
One (self only)		8	6
Two		15	9
Three		20	26
Four		32	33
Five		18	18
Six or more		6	8
<u>NUMBER OF CHILDREN UNDER 18 YEARS OF AGE IN HOUSEHOLD</u>			
None		40	32
One		25	27
Two		21	29
Three		8	9
Four		3	2
Five		0	2
Six or more		1	0
<u>NUMBER OF CHILDREN 13-17 YEARS OF AGE IN HOUSEHOLD</u>			
None		71	68
One		25	26
Two		3	6
Three		1	0
Four		0	0
Five		0	0
Six or more		0	0
<u>NUMBER OF CHILDREN 6-12 YEARS OF AGE IN HOUSEHOLD</u>			
None		72	64
One		15	24
Two		10	11
Three		1	0
Four		0	2
Five		0	0
Six or more		1	0
<u>CHILDREN UNDER 6 YEARS OF AGE IN HOUSEHOLD</u>			
None		75	74
One		18	20
Two		6	3
Three		1	2
Four		0	0
Five		0	2
Six or more		0	0

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PTO-002629

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

BASE SIZE →	Random Sample (71) %	Butterball Users (66) %
FREQUENCY PURCHASE TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER		
More than once a week	21	27
Once a week	38	36
Once every 2-3 weeks	25	24
Once a month	8	6
Once every 2 months	3	2
Once every 3 months	4	5
FREQUENCY EAT TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER		
More than 3 times a week	10	12
2 to 3 times a week	23	33
More than once a week	14	15
Once a week	20	11
Once every 2-3 weeks	24	23
Once a month	6	5
Once every 2 months	1	0
Once every 3 months	3	2
TYPE OF TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER PURCHASED AND EATEN MOST OFTEN		
Oven Roasted	45	52
Honey Roasted	30	27
Smoked	20	17
Flavored (i.e. Italian, Cajun, Peppered)	3	5
Other	3	0
BRAND(S) OF TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER PURCHASED AND EATEN IN PAST 3 MONTHS		
Boar's Head	59	48
Butterball	49	100
Louis Rich	49	61
Healthy Choice	39	56
Sara Lee	27	38
Bil Mar	18	24
Mr. Turkey	17	29
Alpine Lace	15	26
Dietz & Watson	7	9
Other	17	6

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PTO-002630

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

	BASE SIZE →	Random Sample (71) %	Butterball Users (66) %
BRAND OF TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER PURCHASED AND EATEN MOST OFTEN			
Boar's Head		42	35
Butterball		24	30
Sara Lee		18	18
Bil Mar		3	5
Carolina		3	0
Healthy Choice		3	2
Louis Rich		3	5
Alpine Lace		1	3
Dietz & Watson		0	0
Mr. Turkey		0	2
Other		3	2
PEOPLE IN HOUSEHOLD WHO USUALLY EAT TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER			
Self		100	100
Other adults age 18 and over		45	56
Children 13 - 17 years of age		18	23
Children 6 - 12 years of age		13	18
Children under 6 years of age		7	11

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KEY DEMOGRAPHIC & USAGE DATA
- RANDOM SAMPLE SEGMENTS -

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PTO-002632

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

	BASE SIZE →	Random Sample (71) %	Moistness/ Tenderness Seekers (37) %	Drier/ Less Tender Seekers (34) %
<u>MARKET</u>				
New York		34	35	32
Atlanta		34	35	32
Chicago		32	30	35
<u>GENDER</u>				
Male		21	32	9
Female		79	68	91
<u>AGE</u>				
21-24				
25-29		7	3	12
30-34		7	5	9
35-39		13	8	18
40-44		18	22	15
45-49		24	22	26
50-54		18	24	12
		13	16	9
<u>MARITAL STATUS</u>				
Married				
Single (never married)		68	68	68
Divorced		20	16	24
Widowed		10	11	9
Separated		0	0	0
		3	5	0
<u>HIGHEST LEVEL OF EDUCATION COMPLETED</u>				
Completed high school or equivalent				
Some college		24	24	24
Completed college		42	43	41
Attended or completed graduate school		23	16	29
Attended or completed technical school		10	14	6
		1	3	0
<u>HOUSEHOLD TOTAL YEARLY INCOME BEFORE TAXES</u>				
Under \$15,000				
\$15,000-\$24,999		3	0	6
\$25,000-\$34,999		6	3	9
\$35,000-\$44,999		14	14	15
\$45,000-\$59,999		25	32	18
\$60,000 or more		18	22	15
		34	30	38

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PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

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PTO-002633

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

	BASE SIZE →	Random Sample (71) %	Moistness/ Tenderness Seekers (37) %	Drier/ Less Tender Seekers (34) %
<u>NUMBER OF PEOPLE IN HOUSEHOLD</u>				
One (self only)		8	11	6
Two		15	14	18
Three		20	16	24
Four		32	27	38
Five		18	24	12
Six or more		6	8	3
<u>NUMBER OF CHILDREN UNDER 18 YEARS OF AGE IN HOUSEHOLD</u>				
None		40	41	41
One		25	22	29
Two		21	19	24
Three		8	11	6
Four		3	5	0
Five		0	0	0
Six or more		1	3	0
<u>NUMBER OF CHILDREN 13-17 YEARS OF AGE IN HOUSEHOLD</u>				
None		71	65	76
One		25	30	21
Two		3	3	3
Three		1	3	0
Four		0	0	0
Five		0	0	0
Six or more		0	0	0
<u>NUMBER OF CHILDREN 6-12 YEARS OF AGE IN HOUSEHOLD</u>				
None		72	65	79
One		15	14	18
Two		10	16	3
Three		1	3	0
Four		0	0	0
Five		0	0	0
Six or more		1	3	0
<u>CHILDREN UNDER 6 YEARS OF AGE IN HOUSEHOLD</u>				
None		75	76	73
One		18	22	15
Two		6	3	9
Three		1	0	3
Four		0	0	0
Five		0	0	0
Six or more		0	0	0

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PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

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PTO-002634

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

	BASE SIZE →	Random Sample (71) %	Moistness/ Tenderness Seekers (37) %	Drier/ Less Tender Seekers (34) %
<u>FREQUENCY PURCHASE TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER</u>				
More than once a week		21	14	29
Once a week		38	49	26
Once every 2-3 weeks		25	24	26
Once a month		8	8	9
Once every 2 months		3	5	0
Once every 3 months		4	0	9
<u>FREQUENCY EAT TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER</u>				
More than 3 times a week		10	11	9
2 to 3 times a week		23	19	26
More than once a week		14	19	9
Once a week		20	22	18
Once every 2-3 weeks		24	19	29
Once a month		6	8	3
Once every 2 months		1	3	0
Once every 3 months		3	0	6
<u>TYPE OF TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER PURCHASED AND EATEN MOST OFTEN</u>				
Oven Roasted		45	49	41
Honey Roasted		30	22	38
Smoked		20	22	18
Flavored (i.e. Italian, Cajun, Peppered)		3	3	3
Other		3	5	0
<u>BRAND(S) OF TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER PURCHASED AND EATEN IN PAST 3 MONTHS</u>				
Boar's Head		59	62	56
Butterball		49	46	53
Louis Rich		49	46	53
Healthy Choice		39	38	41
Sara Lee		27	27	26
Bil Mar		18	19	18
Mr. Turkey		17	22	12
Alpine Lace		15	16	15
Dietz & Watson		7	11	3
Other		17	24	9

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PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

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PTO-002635

DEMOGRAPHIC AND USAGE DATA FOR THE DELI TURKEY BREAST STUDY

	BASE SIZE →	Random Sample (71) %	Moistness/ Tenderness Seekers (37) %	Drier/ Less Tender Seekers (34) %
BRAND OF TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER PURCHASED AND EATEN MOST OFTEN				
Boar's Head		42	41	44
Butterball		24	24	24
Sara Lee		18	16	21
Bil Mar		3	3	3
Carolina		3	3	3
Healthy Choice		3	0	6
Louis Rich		3	5	0
Alpine Lace		1	3	0
Dietz & Watson		0	0	0
Mr. Turkey		0	0	0
Other		3	5	0

PEOPLE IN HOUSEHOLD WHO USUALLY EAT TURKEY BREAST SLICED TO ORDER FROM THE DELI COUNTER

Self	100	100	100
Other adults age 18 and over	45	51	38
Children 13 - 17 years of age	18	19	18
Children 6 - 12 years of age	13	14	12
Children under 6 years of age	7	5	9

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PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

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